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ABSTRACT

In 1980 four state assemblies were convened by the American Association of Community and Junior Colleges (AACJC) to evaluate state education policies and to recommend changes that would enhance opportunities for lifelong learning. This monograph presents the final reports and accompanying background papers of these assemblies. After Edmund Gleazer's introduction, Jamison Gilder reviews the mandate of the assemblies and summarizes their recommendations for policy changes in the areas of college mission, equal opportunity, funding formulas, local district autonomy, staff development, cooperative efforts, resource sharing, and state regulations. Final reports for North Carolina, Florida, New York, and California are then presented, along with five background papers: (1) "Issues and Problems in Lifelong Education in North Carolina," by Grover Andrews; (2) "Recommendations of the 1979 AACJC Assembly on Lifelong Education: Implications for North Carolina," by H. James Owen, Jr.; (3) "Implications for Florida," by Benjamin R. Wygal; (4) "The Financial Implications in Policy Development for Lifelong Education in Florida," by Lee Pryor Young; and (5) "Setting Goals for the Future of Lifelong Learning in New York State," a background paper for New York's regional forums. Each report contains recommendations for various state agencies and offices, individual colleges, and the public. (JP)

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MODERNIZING STATE POLICIES

Community Colleges and Lifelong Education

A report from the Policies for Lifelong Education Project, American Association of Community and Junior Colleges, Washington, D.C.

With support from the W.K. Kellogg Foundation, Battle Creek, Michigan

Jamison Gilder, Project Director and Editor

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Introduction

The American Association of Community and Junior Colleges has been leading a three-year effort to advance lifelong education by developing recommendations that will help to modernize outdated policy frameworks that affect community colleges. The work has been concentrated in our Policies for Lifelong Education office and has been supported by the W.K. Kellogg Foundation.

Much of the need for change is in the area of state policy. The mission statements and finance mechanisms (that control community colleges) are products of the state policy structure. Many are out of step with the present times and even more inappropriate to what we already know about the future. State governments and community colleges both need more modern policy frameworks that will meet student needs, college needs, and state government needs.

During 1980 the Association convened assemblies in four states to develop specific policy recommendations. The four states were North Carolina, Florida, New York, and California. Each state prepared a final report detailing the concrete policy changes needed to advance lifelong education opportunity. The assembly process that organizers used was originally developed by the American Assembly at Columbia University and has been successfully adapted and utilized by AACJC since 1972.

This monograph reports on the recommendations that were developed by each of the four states. The final reports are reproduced here with the names of the assembly participants who worked in their formulation. We are very grateful for the contributions of every member of the state assemblies. They prepared themselves in advance and took their tasks seriously. Participants prepared by studying the issue papers which were distributed in advance, and by reviewing the report of the January 1979 national AACJC assembly. The papers prepared especially for the state assemblies are also included in this monograph.

The process at each of the assemblies was similar. There were both large and small group discussions followed by the preparation of a draft integrated statement of the recommendations of the full group. This draft report was reviewed in detail at the closing session of each assembly—with lively discussions in each case. It is the final report from each group which is printed here as a resource for further study and for action.

Jamison Gilder was the director of the project office which convened the four assemblies and disseminated their reports. She was assisted in that work by Jessica Rocha and Gloria Westpoint. We appreciate the efforts of each of them.

Our Policies for Lifelong Education project was also involved in activities for policy change in needs assessment, federal policy, cooperative agreements, and community forums. An executive summary of the project accomplishments is included in this report.

Edmund J. Gleazer, Jr.

*"Policies for Lifelong Education: Report of the 1979 Assembly." J. Gilder, Editor. American Association of Community and Junior Colleges, Washington, D.C.

State Policy Recommendations from Four States: Summary and Analysis

Jamison Gilder

This chapter presents a summary and analysis of the changes in state policy that were recommended by a series of assemblies on lifelong education in four states: North Carolina, Florida, New York, and California. It discusses the three areas where change appears most needed: mission, finance, and governance control. Also presented are discussions of related policy on staff development, new technology, cooperation, and private sector linkages.

Three Critical Elements

The three most critical elements of state policy framework for lifelong education as it affects community colleges are:

1. Mission statements for the institution
2. Finance mechanisms congruent with the mission
3. Balanced governance control between local and central authority.

Most of the state policy structures are in a bumpy transition these days because of uncertainty on each of these three policies. There are many voices calling for modernization in state government, some prompted by recent changes in the political climate and context, others by the increasing squeeze of resources versus expectations.

The policy changes recommended and summarized here were formulated by over two hundred persons across four states. They believe that the community college will be the institution at the very center of public service in providing lifelong education opportunity to the spectrum of individual citizens.

Context

The community colleges in America have grown rapidly, prospered, thrived on their continuing adaptations, and in the process extended more postsecondary learning opportunity to more individuals than ever before. It has been a tremendous accomplishment for the nation. The aggregate of changes within the community college movement since its inception are startling when viewed with the perspective of decades. And one of the newer but inescapable facts of life for us all, including these wonderfully flexible colleges, is the accelerating rate of change. It has brought on an enormous need to modernize the old policy structures that we used to operate well with years ago, and to devise entirely new policy structures to serve us in new roles unimagined ten or twenty years ago.

The needs are sizeable and still growing, but so is the talent available in the community college movement. The members of these four assemblies were a well-informed, dedicated, and experienced group. They refused to produce unrealistic recommendations that would probably be unattainable in the foreseeable future. Instead they debated the practicality and strategy of their recommendations, and they deliberately aimed them to different audiences, which varied state by state.

The assemblies recognized that change is needed at every level of existing policy—including federal, state, local, institutional, departmental, even single offices such as counseling or student aid. It is the sum of the small incremental adjustments that will finally determine how, where, when, to whom, what subjects, why, and at what

costs we offer some individuals the opportunity to learn something they need to know.

The State Policy Framework

The state policy framework for lifelong education is composed of the state laws, administrative regulations and guidelines, financing formulas, governance structures, authorized programs, personnel practices, and collective bargaining agreements that affect both the community colleges and the individual learners. It is also composed of the operating procedures of agencies and institutions, scheduling practices, eligibility guidelines, information and counseling objectives, outreach strategies, modes of teaching, and methods of evaluation.

State policy frameworks grow increasingly more complex every year, a fact already known by many frustrated community college faculty, students, administrators, and trustees based on their own past experiences. They are trying to function within a policy framework that has simply become outmoded, bearing less and less relationship to their central interests and activities. The aggregate earlier policies have had specific positive and negative effects on the community colleges in their role as primary resources for adult learners in their neighborhoods. It is precisely because the negative effects of inappropriate policies have steadily increased, and because they inhibit individual learning for more and more students, that the time has come to update the policies, to bring them in line with the times and the learners of the 1980's and 90's.

Purposes of the Efforts

The purpose of the Policies for Lifelong Education project was to lay the groundwork for changing those policy frameworks that affect lifelong education at the federal, state, institutional, and association levels but are found wanting. There have been several successes in the areas of federal policy, namely the revision of Titles I and IV of the Higher Education Act and the Education Amendments of 1980. There were important positive changes in the Educational Outreach (Title I) and Student Financial Aid (Title IV) programs.

Another significant change was in the mission of the American Association of Community and Junior Colleges. The new mission adopted by the board in June, 1980, represents a more modern and relevant direction for the national organization. It says that:

> "The Mission of AACJC is to organize national leadership and services for individual and community development through lifelong education."

Several steps were taken during the Policies project in anticipation of and implementation of the new mission. A national assembly was convened in 1979 to develop the first specific policy recommendations in lifelong education. Seven of the recommendations of the national assembly dealt directly with state policy; they are presented below for the reader's reference.

To further expand the specificity of these suggested state policy changes, the series of four assemblies was convened in 1980 in North Carolina, Florida, New York, and California. The primary purpose of the assemblies was to formulate policy recommendations specific to the circumstances of community college systems in each of the states. Another purpose was to examine the consistent elements of a modernized state policy structure that could be shared with other states. The three most critical common elements—mission, finance, and control—are outlined above, and are discussed in more detail in subsequent paragraphs. (Each of the four state assemblies produced an itemized final report of their recommendations for wider circulation, discussion, and action; each is printed in another section of this monograph.)

The following sections discuss those policy features that recurred among the four reports and briefly discusses the circumstances in separate states where needed.

Earlier State Policy Recommendations: The National Assembly

There were seven recommendations from the 1979 national assembly on Policies for Lifelong Education that dealt specifically with state policy. These are reproduced below as background to the individual state recommendations.

To the State Governments, the National Assembly recommends:

- That state (and federal) agencies strongly support the position that a well-funded lifelong education program is essential to the achievement of our national goals of lowering the rate of inflation, increasing productivity of workers, and decreasing unemployment.
- That states change the current patterns of funding based on the generation of full-time equivalent students.
- That interstate projects for lifelong education be established and supported by state boards and coordinating agencies concerned with education.
- That state governments develop funding models to facilitate lifelong education among public and private sectors.
- That state agencies responsible for lifelong education work to develop communication networks and coordinated planning between public and private agencies.
- That the special circumstances of lifelong education be recognized in funding mechanisms such as state aid formulas, student financial aid formulas, and tuition charges. Included in revisions would be provisions for state aid to part-time students and revised standards for determining aid for independent students. Economic status of the individual or community should not be allowed to stifle the motivation for lifelong education.
- That each state appoint a task force on lifelong education to ensure a continual dialogue between provider and consumer of lifelong education, to improve the delivery system of lifelong education, to conduct hearings at the local level on lifelong education, and to arrange for community task forces on lifelong education.

Specific State Policy Recommendations

The most important and fundamental policy change involves the mission of the community colleges. No longer limited to the lower division and transfer colleges of the 1950's and 1960's, today's community colleges are comprehensive community educational resources serving an astonishing variety of individuals. Providing opportunity for lifelong learning *is* the community college role for the 1980's. This is clearly reflected in the mission statement of their national association: "The mission of AACJC is to organize national leadership and services for individual and community development through lifelong education." Each state needs to be more specific and direct in stating the mission of its community colleges.

In the four states where specific efforts have been made to suggest policy changes in lifelong education, there have been several consistent themes. Each state reflected a need for policies that would provide a maximum of flexibility to local institutions in allocation of money and in new program development. There was also a recurring judgment in each state that the funding formulas need revision in order to provide adequate and timely funding for lifelong education activity. The need for funds to provide support services to lifelong learners on an equitable basis with traditional students was also heard repeatedly.

The analysis below reports further details of the state policy recommendations from the assemblies in North Carolina, Florida, California, and New York:

Mission: Foremost in the recommendations on state policy was that lifelong education for individual and community development should continue to be a major mission of community colleges, with all segments of the colleges participating. The colleges will need more flexibility to respond faster with new and different con-

figurations of course content, scope, and sequence. This implies also that the states re-define the roles of differing institutions in lifelong education, with a goal of statewide planning and coordination to eliminate unnecessarily duplicative programs. Advisory committees at the local level should be used in this process to assist in determining needs of particular populations, such as senior citizens. The planning and coordination process should identify learning needs that are not currently being filled by existing services.

Assembly participants in these states felt that community colleges have the **primary** responsibility for providing education for adults in their local service areas, but that lifelong education need not be the **exclusive** responsibility of any one agency.

In modernizing state policy, it was specifically recommended that the lifelong education missions of the community college systems be supported with regard to:

- internal and external constituencies;
- expectations of comprehensive programs and services;
- new learners' needs in the changing culture;
- special student groups; and
- staff and faculty commitment to the mission of the system.

Equal Opportunity: The states re-affirmed their commitments to equal opportunity, and expanded this to say that it meant keeping costs-to-students low and providing aid to the disadvantaged. They also recommended that state policy for lifelong learners be based on a philosophy of equal access tempered by the realization that learners come to education with differing motivations, aptitudes, and abilities.

Education must be accessible to learners in order to promote the concept of lifelong learning, and that accessibility is based on the cost to the learner. Programs for lifelong learning should be supported by public funds to the degree possible in order to provide such programs at the lowest cost to the adult learner, thus ensuring continued access to education for this population.

Funding Formulas: Specific and consistent policy recommendations were made to change the present finance formulas. The patterns of lifelong learning require newer funding methods based on total enrollments and the needs of individual learners rather than "equivalents." Formulas to provide public support for the changed mission of community colleges were suggested, along with changes in the methods of providing student support services.

In state policymaking, the funding for lifelong learning should be apportioned equal to the funding of traditional programs. Specifically, when the program structures and funding formulas are being revised, consideration should be given to the extra costs of servicing a predominantly part-time student population. This would include support of such cost centers as counseling, registration, facilities, and equipment.

Participants in the assemblies suggested the creation of a funding system based on total enrollments and services rather than the current full-time-equivalent-based enrollment process (FTE). They felt that the large numbers of part-time students participating in lifelong education necessitates a more modern funding formula, and that such new methodology would enable institutions to provide the same scope of services to part-time students as are normally available to full-time students. Five other features of a recommended funding formula were: (1) that it provide timely resources to allow effective planning and implementation of lifelong education; (2) that it be adjusted to provide equal incentives to institutions to offer extension and curriculum programs based on local community needs (consideration could be given to differential funding based on program costs); (3) that a policy be established for acquiring funding at variable rates, recognizing that education costs vary by type of program and enrollees, that funds should be provided on a differential scale, and that a force should be created to report changing needs directly to advisory budget committees, legislative committees, county commissioners, and finance departments; (4) an equitable formula that does not make it

fiscally advantageous to a college to offer certain courses and not others; and (5) changing the state funding formula for credit and non-credit programs to include other recognizable self-directed adult learning activities.

Future funding for lifelong education opportunity should not be exclusively a state government responsibility, however, but should include business and industry as additional sources of support. One state assembly recommended that research be conducted to identify alternative models for funding lifelong learning, including models from other nations as well as the United States, and to study the economic impact of lifelong learning programs on the individual and also on publicly supported health and social service agencies (such as mental health, offender rehabilitation, and programs for the aging).

Assembly participants asked their state policy makers to recognize the special strengths and primary responsibilities of community colleges in their local service areas. It also advised states to document community college contributions by conducting economic impact studies.

Maximum Local Flexibility: Strong recommendations were made in each state to retain the maximum flexibility in each local institution to respond to its citizens. The flexibility was considered critical in both allocating money and in developing new programs. Policies for allocation of fiscal resources and program offerings in adult and continuing education should be determined at the local level. State regulatory agencies should encourage this flexibility and local autonomy to educational institutions, particularly for program development. Also, policies and procedures adopted by state agencies must be equally applicable to all institutions receiving public funds.

Participants in one assembly expressed strong dissatisfaction with central control and regulations that increase costs and inhibit the responsiveness, flexibility, and successful operation of institutions that operate under central control. Boards of trustees of community colleges were recognized as being in the best position to identify local lifelong learning needs. It was recommended that the state executive and legislative branches not impede the prerogatives or capabilities of the local boards to quickly and effectively respond to needs—exerting particular flexibility in responding to adults. Outreach programs, length of classes, methods of instruction would be adaptable and locally determined. Policies would clearly spell out the matter of accountability in connection with lifelong education.

Staff Development: Three states also called specifically for a state policy mechanism to provide for staff development for those serving adult learners. Personnel policies at individual institutions also need to be reviewed and adjusted where necessary to ensure effective institutional response to lifelong learners. New staffing patterns, leave policies, and exchange agreements may be needed.

Colleges should consider the use of staff and program development and other appropriate funds to ensure that all staff and faculty understand adult learners and are competent to deal with them as individuals and in groups. Colleges should also consider the possibility of providing peer counseling, and an emphasis on the need to convey an attitude of acceptance of the student, irrespective of the student's age or purpose of attendance.

Support funds should be sought so that institutions and systems could act cooperatively in these development efforts, sharing resources and ideas (particularly in utilizing new delivery systems).

Part-time faculty and lifelong learning needs are intertwined as a managerial and organizational problem. There is a need to assure equal quality control measures for part-time as for full-time faculty. Specifically, one assembly recommended that community colleges provide appropriate in-service training activities for faculty (including part-time) designed to utilize their talents to their full potential.

Staff development programs for both full-time and part-time faculty should emphasize teaching strategies for and sensitivity toward

adult learners, their motivations, and helpful delivery services. At the same time, a more sophisticated productivity model than the "load hour" is needed. (The load hour is a unit of measure of a faculty member's productivity.)

The New York Assembly specifically recommended that the board of regents review the "full time majority of faculty" in terms of its consistency with goals of lifelong education and the learning society, and with the experience of many successful adult learning programs. They felt such a rule limits the desired flexibility of programs. The review should examine measures of faculty competence and other services available to students, rather than simply numerically count full- and part-time faculty. But staff development is also needed for persons other than faculty. Trustees, presidents, and other administrators could be brought together in a series of regional meetings to discuss changing student needs and institutional responses. Trustee and administrative development should be designed as a continuing process.

Use New Technology: Rapid advances and lower costs for new technologies led to several recommendations that states explore, encourage, and provide for utilization of the new ways to serve adults in their learning.

Acknowledgement and planning consideration must be given to the forces of technology that are impacting the society and culture at an accelerating rate. For example, the integration of the mini-computer, the video screen and the telephone, as well as radio and television, have enormous possibilities to enhance opportunities for learning. Specifically, the groups recommended that colleges be provided with resources and incentives to provide nontraditional learning modes of instruction with reward systems that encourage faculty to engage in these new technological delivery systems. Technically-oriented business and industry should have a major partnership with the colleges in applying new technologies to expanding educational opportunities geared to lifelong educational needs.

Colleges should also be encouraged to use new technological methods, and to develop new strategies to meet the needs of the nonmobile populations, such as home-bound or institution-bound students.

In North Carolina, the state assembly participants pointedly recommended that all providers be ensured equitable programmatic access to a comprehensive statewide public broadcasting system that could be used by all North Carolina educational delivery systems. It would follow that policy control of the broadcasting system would be shared among the public schools, the community and technical colleges, and the state university. Other experimental and pilot efforts with satellite relay, computer delivery, PBS, and mixed media should be supported. Present providers of education opportunities should also pursue effective delivery through available, existing technology.

Cooperation and Consortial Efforts: Three of the four states suggested policy incentives to encourage cooperation and collaboration. Lifelong education in the community college is a shared responsibility with all those in the community; in some instances, shared, cooperative ventures among the various agencies need to be developed. One group recommended that the state education department encourage voluntary consortial approaches when evaluating proposals for participation in state or federally funded programs.

Another state specifically suggested developing a new "index of cooperative effort" and providing rewards for such efforts. Specifically, the Florida assembly asked the Division of Community Colleges to create an index to measure the extent and scope of a college cooperative enterprise, and that a reward system be developed to encourage such innovation. This index methodology should gauge the level of cooperative activities and their degree of impact.

Community colleges should serve as a catalyst for promoting cooperative efforts among public and private agencies to build, equip, and staff joint-use facilities. Examples of these facilities include libraries, schools, recreation facilities, auditoriums, health facilities, and child service clinics.

Seed money should be provided to foster cooperative local projects to address identified problems. These demonstration or pilot programs could be funded by a $.05 per citizen (in Florida) allocation to the cooperating agencies.

Linkages and Resource Sharing: Assembly participants felt that business and industry could be better served by closer linkages and resource sharing, and that state incentives could be very helpful, particularly in the areas of more advanced technology.

The state policy should provide the necessary incentives to industry and business to establish cooperative relationships and programs with the community colleges, especially in areas of advanced technology. New legislation should be written and enacted to allow greater flexibility in partnership efforts between industry and colleges to fulfill lifelong education needs, including state aid for contractual courses offered by public institutions.

Two year colleges should develop and disseminate specific information about these industry-education linkages for the purpose of establishing new linkages at the local level.

Revise Regulations: In light of new lifelong education goals, it may be necessary to change some of the older state agency regulations that may no longer be appropriate to all learners. State policy should recognize the potential diversity of lifelong education providers and ensure that all providers receiving public funds are subject to the same standards.

Greater consideration should be given to life-learning experiences in student placement and credit accepted for such learning. Credit by examination must receive more acceptability. State and local policies should encourage non-traditional learning strategies in both credit and non-credit programs.

Additional measures should be developed for determining individual student success (other than certification of time expended, persistence to graduation or transfer, or specific class completion). Such measuring devices could include performance demonstrations, personal satisfactions, or other learner self-assessments.

Efforts should be started immediately to develop alternate or additional accountability methods for determining the perceived success levels of students who are enrolled in non-traditional programs or institutions. For example, different measures are needed to reflect the success of the "graduate" as well as the success of the "early leaver" with marketable skills.

Summary

There are several areas within the state policy frameworks where the need for change seems to recur among a number of states. The most important and critical of the needed changes are 1) the clarification of institutional mission statements in lifelong education, 2) the adjustment of local and state financing mechanisms to be congruent with the clarified mission, and 3) a more stable balance between the local and central governance authorities to allow for the implementation of a clear mission.

The mission statement is obviously created to help the institution, or the state, to clarify what kind of purpose the institution will have, the sort of continuing objectives it will follow. The dilemma in the four states as well as in other parts of the country is this: whether to emphasize the traditional transfer function in the community or to set the college on a course that will include lifelong education.

The mission statement, moreover, will need to recognize the economic climate that may aid or hinder realization of goals—and to deal intelligently with it. Community colleges that pursue lifelong education do so even as local tax support declines or is supplanted by more distant state support. As this report implies, there is a need to generate understanding among policymakers at state and national levels that will lead to required financial support.

The four state assemblies provide models for the communication process. The recom-

mendations of the participants point the way to elimination of barriers to lifelong education. The future of the enterprise is much more certain as the result of their deliberations and recommendations.

At its final meeting, the Policies for Lifelong Education project advisory committee suggested future efforts be concentrated on action, research, and linkage. A focused approach within one state was recommended in order to achieve the coordinated changes of mission, finance, and governance (outlined by the project's four state assemblies). Research efforts to continue building the community college rationale for lifelong education and adult learning were also advised. The committee stressed the importance of linkages with other mutual interest groups in both the public and private sector. Their linkage suggestions were especially strong in the areas of manpower training and development.

Policies for Lifelong Education 1978-1981 Project Summary

Q. What was the nautre of the project?

A. The Policies for Lifelong Education Project was a three-year effort (from 1978 through 1981) led by AACJC to advance lifelong education through development of more favorable policy frameworks. The project activities were designed to formulate specific new policy recommendations for changes in the local, state, federal, and Association policy structures. The types of activities involved were assemblies, public hearings, community forums and courses by newspaper, information gathering, analysis, and dissemination. The project was supported by the W.K. Kellogg Foundation of Battle Creek, Michigan.

Q. What did the project accomplish?

A. In the Association, a new five-year mission statement and continuing objectives were adopted: "The mission of AACJC is to organize national leadership and services for individual and community development through lifelong education." The Association also successfully adapted its mechanism for convening community forums to allow the community college itself (and the issues of its proper future mission) to become the subject of a series of national forums involving 150-200 colleges.

In the local communities, the project engaged nearly 450 community colleges and other local groups in a review of the issues of the community college role in the process of "Education for Community Development." It further involved approximately 150-200 colleges in conducting forums and the associated courses by newspaper. The project also described the nature and extent of community college cooperative agreements with other community groups. These new data were made available to all colleges through an article in the *Community and Junior College Journal*, and a summary brochure was widely distributed.

Four assemblies convened in North Carolina, Florida, New York, and California produced detailed and itemized reports of policy changes recommended at the state level. Each of the four reports was widely circulated within the states. A summary and analysis were prepared and distributed to the full membership of AACJC. The three most critical parts of the state policy framework for lifelong education are the mission statements, the finance mechanisms, and the balance of local versus central control for individual colleges.

The project contributed to the federal Education Amendments of 1980 by providing testimony at hearings dealing with lifelong education. The staff also shared information and ideas with other groups and colleges in support of the federal Education Outreach and the Student Financial Aid programs. The project director served on a number of task forces to study the needs for student assistance among adult learners.

Q. Are there any products I can use in my own work?

A. There is a book by AACJC President Edmund J. Gleazer, Jr., *Values, Vision and Vitality*. There is a full report of the 1979 national assembly with the policy recommendations developed by nearly 100 prominent participants; this report also includes a set of six issue papers about lifelong education and community colleges. There is a book about recommended changes in the

state policy frameworks. It reports on the results of a series of four 1980 state assemblies, and contains a summary and analysis along with the background issue papers prepared for the assemblies.

There is a brief video cassette showing how televised public hearings on lifelong education were produced in Charlotte, North Carolina. The video cassette is available on revolving loan from AACJC and may be copied for future use. It contains information on how the local coordinator organized a committee, established testimony guidelines, arranged for an important panel of state politicians to hear the testimony, convened the hearings, and created a separate committee for follow-up. The tape also shows excerpts of some of the testimony.

There is a report detailing the nature, frequency, and sources of support for over 10,000 existing cooperative agreements between community colleges and other community groups. This report appears in the November issue of the 1980 *Community and Junior College Journal*. The data have also been summarized in a brochure and distributed to colleges and cooperating groups, and is available from AACJC. Other materials include the press kits developed for the series of community forums and courses by newspaper on Education for Community Development. The kits contain six articles discussing the issues, illustrations, press releases, public service announcements, feature stories, and several other brochure and publicity items. They are designed for use by individual colleges in cooperation with local newspapers. The kits were prepared by the Courses by Newspaper staff, University Extension, University of California at San Diego.

Q. How will this work be continued?

A. The efforts have been drawn into the mainstream of AACJC activity with the adoption and implementation of the new 1980 mission statement and continuing objectives. The work will also be extended by building coalitions with those active groups already cooperating with community colleges. These relationships will be important in the work for policy change. One example is the joint effort with the Study Circle project in New York to produce materials and mechanisms that serve a variety of local constituencies.

There are also three groups active in North Carolina, Florida, and New York as a result of the state assemblies there. They are addressing different problems and reflect the power of circumstances in state change efforts.

Q. Who were the people associated with the project?

A. Edmund J. Gleazer, Jr., president of AACJC, was chairman of the project advisory committee: Jamison Gilder was project director. Dr. Gilder was assisted by Gloria Westpoint, staff assistant, Jessica Rocha, secretary, and Mona Lapides, secretary. The members of the advisory committee were Clarence Blount, Wilbur J. Cohen, J. Wade Gilley, James F. Gollattscheck, Harold H. Hodgkinson, Gloria Johnson, Roby Kidd, Jr., Norman Kurland, Bart L. Ludeman, Carrie Meek, Jules Pagano, John Roueche, Col. Robert N. Waggener, and Norman E. Watson.

Q. What can I do?

A. Get involved in changing the policy structures that affect your institution. Learn how to participate in the social, institutional, political, and media processes that go into changing policy. Work with the state government agency to clarify the mission of the community college in lifelong education. Propose and seek support for a new finance formula that goes along with a changed mission. Explain to both local and state officials and radio, television, and newspaper editors the importance of local control and flexibility in responding to community needs. Continue efforts in staff development to help those serving adult learners. Study how expanded cooperation and use of new technologies will influence the need for policy adjustments in your system and college. Stay in touch with AACJC to share information and ideas.

NORTH CAROLINA ASSEMBLY
ON POLICIES FOR
LIFELONG EDUCATION
(Background Papers
and Final Report)

Winston-Salem,
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Issues and Problems in Lifelong Education in North Carolina: One Step Towards Resolution

Grover J. Andrews

The American Association of Community and Junior Colleges is to be commended for having developed and implemented a national project that focuses on the issue of *policy* for lifelong education. While there are many issues and problems involved in providing lifelong educational opportunities for the learner, the key to resolving most of them is that of the development and implementation of appropriate policy.

H. James Owen has addressed the specific recommendations of the 1979 AACJC Assembly on Lifelong Education and has detailed the implications of the recommendations for North Carolina. In so doing he has also presented a comprehensive overview of the educational demographics of the state.

This paper will attempt to define lifelong education, identify the major issues and problems in providing lifelong education for the people of North Carolina, and propose one step that should be taken that may lead to the resolution of the major issues and problems.

What Is Lifelong Education?

According to Aristotle, "All men by nature desire knowledge." In the *Handbook of Terminology for Classifying and Describing the Learning Activities of Adults* prepared by the National Center for Higher Education Management Systems in 1978, *lifelong education* is defined as "learning activities, including all skills and branches of knowledge, using all possible means, and giving the opportunity to all people for full development of their personalities. It considers the formal and nonformal learning processes in which children, young people, and adults are involved during their lives." From the same source *lifelong learning* is defined as:

(1) the process by which a person acquires knowledge and skills through his/her life span, in order to maintain or improve occupational, academic, or personal development;

(2) includes, but is not limited to, adult basic education, independent study, agricultural education, business and labor education, occupational education and job training programs, parent education, postsecondary education, pre-retirement and education for older and retired people, remedial education, special education programs for groups or for individuals with special needs, and educational activities designed to upgrade occupational and professional skills, to assist business, public agencies, and other organizations in the use of innovation and research results, and to serve family needs and personal development.

Richard E. Peterson of the Educational Testing Service in his book *Toward Lifelong Learning In America*, which was published in 1979, says "Lifelong learning is a conceptual framework for conceiving, planning, coordinating, and implementing activities designed to facilitate learning by all Americans throughout their lifetimes."

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From these definitions of and information about lifelong education and lifelong learning, there are many useful elements with implications that may be significant in the accomplishments of the objectives of this conference. However, there are two major points to be emphasized. First, there is the matter of the comprehensive nature of the concepts. They include all of the learning activities of individuals and groups, in school from pre-school to post-graduate, and out of school to include all forms of learning—formal, informal, and nonformal —regardless of source or provider. Second, the concepts imply a dynamic process that is continuous and is not fixed in time, meaning, form or substance.

The concepts of lifelong education and lifelong learning therefore reflect the changing social, political, and economic structures within the United States. Just as this society is in a state of visible transition, so is the formalized educational component of our society in visible transition. Many hope that this transition will lead to significant reforms in the educational structures that will enable our existing institutions to meet the lifelong educational needs of the country. The potential for reform is present. The realization of the potential rests on the policy decisions that will be made and the policy implementation that takes place.

Who Provides Lifelong Learning Opportunities?

The list of providers of formal lifelong educational opportunities in the country is endless and diverse, and the number of learners is almost overwhelming. The first comprehensive national study of adult learning activities conducted by Johnstone in the early 1960's revealed that approximately 25 million adults were engaged in some form of formal learning experience annually.

Nearly ten years later, in the early 1970's, the Commission on Nontraditional Study headed by Samuel Gould estimated that the number had grown to 80 million. Perhaps the best estimate came in 1978 from The College Board project on "Future Directions for A Learning Society." It estimated that 58.4 million adults were involved in formal learning in 1978. The figures released by The College Board are presented in the Figure, with a breakout of participants among 16 major provider classifications. If should be of interest to this assembly and is significant to note that of the estimated 58.4 million participants, only 12.4 million were enrolled in "school." These data could provide the basis for many research activities, but perhaps one topic basic to this assembly could very well be "why are not more of the other 46 million adult learners coming to our educational institutions?"

Who are the lifelong education providers in North Carolina? First and foremost are the community colleges and technical institutes and colleges. Based on the founding principles and subsequent modifications to the state system, these institutions were intended to supply opportunities for lifelong education. The 16 public universities are also involved in lifelong education, primarily through their extension, continuing education, and public service functions. Many of the state's 38 private colleges and universities have begun lifelong educational activities. In addition, there are many other providers operating in North Carolina—the numerous proprietary institutions and organizations, business and industry, and professional organizational programs, government, and social-community organizations. The range of lifelong learning activities in North Carolina would probably parallel the national statistics presented by the College Board in the Figure.

Issues and Problems

Because of the large and diverse group of providers, there are numerous problems involved in developing an effective state-wide policy for lifelong learning.

Basic among them are *role and purpose*—who is responsible for what and where is duplication acceptable or unnecessary;

finance—what funding sources are available to whom and what reallocations of available funds should be made by whom for which providers; and *coordination*—how is adequate coordination and cooperation going to be achieved without over-regulation?

Generally the issues and problems can be viewed from two perspectives: those that are *external* to the individual providers, and those that are *internal* within a providing institution.

External issues deal with the role, purpose, and scope of the providing institution, and, where appropriate, for the systems such as the community and technical colleges and the Consolidated University of North Carolina. Of paramount importance also is the issue of public support and legislative appropriations for the two systems that are controlled independent of each other, and appear to some to duplicate programs at some levels, and to compete for students and resources.

In spite of complex and sometimes perplexing situations, there are good examples of effective cooperation that benefit the lifelong learner: the North Carolina Rural Renaissance Project; the Governor's Community School Program; the Wake County Community Schools Project; the ABE Consortium; the Consolidated University Independent Study Program, which has cooperative agreements with a few of the community colleges; the offering of college credit courses by institutions on campuses where such is not authorized; and transfer-articulation arrangements between the community colleges/institutes and the senior colleges and universities.

While these and the numerous other cooperative programs currently in operation are individually effective, there are too few such programs and the effort is probably fragmented and uncoordinated when viewed from the state as a whole. Another factor to be considered is that good cooperative programs are not always accepted—someone, somewhere will object and all too frequently may be heeded.

Internal issues and problems for lifelong education institutions may be generally identified with peculiar differences formed within the various types of structures. These are:

(1) *Purpose, role, and commitment*. Serving the lifelong learner involves a specific purpose and role definition with a strong commitment from the administration, including governance, academic administration, and instructional staff. Achieving agreement on purpose and role, and securing *actual* commitment to the concept of lifelong learning is sometimes difficult at best. External control and authorizing bodies must also agree to and support the lifelong education role.

(2) *Administrative Organization*. Designing an appropriate organizational structure for the institution to facilitate the lifelong education mission of the institution is essential. Such an organization should recognize and provide for the involvement of lifelong learners, user groups, and other providers.

(3) *Resources*. The resources of the institution must be organized, allocated (sometimes reallocated), and accounted for in direct relation to achieving the lifelong learning mission of the institution. This includes physical facilities, financial assistance programs, instructional staff, and learning resources.

(4) *Instructional Concepts and Student Achievement*. Lifelong learning usually calls for additional (and different) learning processes, instructional modes, and assessment methods for measuring student achievements. Working with lifelong learners is different and calls for an understanding of the learners involved, their needs, and requires new or modified instructional-learning services (instruction, counseling, advisement, evaluation, scheduling, and program delivery).

(5) *Assessment and Evaluation*. Apart from the differences needed in assessment and evaluation of student achievements through the instructional program of the institution, the lifelong learning institution must design and engage in an on-going system of institutional assessment and evaluation. This would include needs assessment of potential

learners and the outside achievements of previous learners in order to maintain an up-to-date curriculum and relevant instructional staff.

Obviously there are other issues and problems; however, many of these will be included in the five major areas mentioned above.

What Should Be Done in North Carolina?

The basic question is what can the state of North Carolina, or any state for that matter, do to develop and make operational (effectively) a policy for the coordination and delivery of lifelong education to meet the needs of all learners at all levels from a large and diverse number of providers. How can a policy for total education for the total population of the state be so constructed and implemented to achieve such a worthy goal?

The news media are currently providing extensive coverage of a proposed "open university" for America in order to provide access to the many citizens of this country who do not have access to education. While such a goal is worthy, would such a projet be necessary if the educational resources already in place within our country, and especially within North Carolina, were skillfully coordinated to serve all the people? The answer would obviously be no!

North Carolina has a wealth of educational institutions and other providers of educational programs and courses. The numbers of institutions alone are sufficient and the geographical distribution throughout the state is such that with proper coordination and planning a program of lifelong education can be conveniently delivered to all of the state's citizens. In order to achieve such a program the State of North Carolina needs to identify, develop, and implement an appropriate means for conceiving, planning, coordinating, and implementing a unified program of lifelong education for all its citizens through its existing educational institutions and systems.

Governor's Conference

The governor of North Carolina, who is already on record in support of total education for the citizens of North Carolina, should host a governor's conference on lifelong education for the citizens of North Carolina.

The governor's conference should be jointly sponsored by the North Carolina Community and Technical College System, the University of North Carolina, and the North Carolina Association of Independent Colleges and Universities. The conference should involve representatives of all other provider groups, business and industry, professional organizations, local governments, citizens groups, and legislative educational committee members.

The conference should focus on the development of a state-wide policy that would provide the framework for achieving operationally the coordination, support, and delivery of a program of lifelong education for all citizens of North Carolina in meeting the total educational needs of the state.

Preliminary to the governor's conference on lifelong education for the citizens of North Carolina, the governor of the state should commission a state-wide study of lifelong learning activities currently in operation and identify and document lifelong education needs. Such a study would provide the data base needed for successful deliberations. Accurate information on what exists and what is needed would be essential for fair and equitable decisions to be made on policy, role, scope and purpose, program development, and resource needs and allocation.

Major problems of boundary maintenance, including both geographical and program boundaries, resource allocation, and new program implementation, cannot be successfully resolved in the absence of a comprehensive policy that unifies the educational mission and resources of the state for the achievement of total lifetime education (plan and program) for all citizens.

Should the idea of a governor's conference on lifetime education for the citizens of

North Carolina be accepted, it would be necessary to take the following steps:

(1) A planning committee, representative of providers and consumers, should be appointed by the governor to address the following:

a. Identify and define the scope and specific objectives for the conference.

b. Define the role and scope for the preliminary survey to be made of lifelong learning activities within the state.

c. Prepare a proposed program and schedule for the conference to be presented to the governor.

2. If the proposed program is acceptable and feasible, the governor should authorize the conference and the survey and announce the program.

3. The governor should appoint a steering committee to coordinate the statewide survey of lifelong education providers and to implement the governor's conference on lifelong education.

The governor's conference on lifelong education for the citizens of North Carolina would be the first step towards achieving a successful coordination and delivery of the rich and diverse educational resources of this state to effectively meet the lifelong educational needs of all the citizens.

Maybe this conference can encourage that this first step be taken in 1981.

Figure

Sources	School Nonschool	(Millions)
Agricultural Extension	(NS)	12.0
Community Organization	(NS)	7.4
Private Industry	(NS)	5.8
Professional Associations	(NS)	5.5
College and University Part Time	(S)	5.3
City Recreation	(NS)	5.0
Churches and Synagogues	(NS)	3.3
College and University Extension and Community Education	(S)	3.3
Government Services	(NS)	3.0
Public School Adult Education	(S)	1.8
Federal Manpower Program	(NS)	1.7
Military Services	(NS)	1.5
Graduate and Professional Education	(S)	1.5
Trade Unions	(NS)	.6
Community Education	(S)	.5
Free Universities	(NS)	.2
Total		58.4

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Recommendations of the 1979 AACJC Assembly on Lifelong Education: Implications for North Carolina

H. James Owen, Jr.

It is most fitting that the first of four state assemblies on lifelong education be held in North Carolina. Governor James B. Hunt, Jr., of North Carolina wrote the keynote statement for the 1979 Assembly at Airlie House. There he spoke to the six broad goals identified by the blue ribbon commission that he had proposed in 1975 while lieutenant governor. That commission reported out its blueprint in 1977 in its study entitled *Total Education: The Duty of the State*. Edmund J. Gleazer, Jr. in his book entitled *The Community College: Values, Vision, and Vitality*, states that "North Carolina has developed a clear-cut statement" regarding lifelong learning. He notes that the goals identified in *Total Education* are right on target, as they relate to the needs of the "adults" of North Carolina in the areas of manpower development, accessibility, illiteracy, citizenship skills, cultural renaissance, and the use of resources. Following the Assembly, Governor Hunt sent the Airlie House report and recommendations to the remaining 49 governors, calling upon them to establish task forces to focus on lifelong education.

Governor Hunt noted the changing backgrounds, needs, and conditions of students now coming to the community college system. The typical student enrolled in degree or certificate programs in North Carolina community colleges is likely to be about 26 years of age, female, employed full- or part-time, and attends class part-time. The typical continuing education student is likely to be female, married, living with her spouse, and about 38 years old. She is likely to be working full- or part-time, enrolled in occupational extension courses, and attending classes in the evening at an off-campus site. He cautioned that the future policies developed at the state and local level "must accommodate the changing educational needs and interests of all our citizens."

As far back as the early 1960's, North Carolina's leadership in total lifelong education was exemplified. Governor Terry Sanford stated that the community college should be an institution that undertakes everything not being taken care of elsewhere. By that he meant educating the illiterate, uplifting the underprivileged, and retraining the unemployed.

North Carolina is one of only a few states that embody the clear program assignment in law and regulation to eduate and serve adults through a complete spectrum of programming within its community college system as opposed to sharing this responsibility with post-secondary area vocational schools and the public schools. The mission of the North Carolina community colleges includes vocational, technical, and college transfer, or college parallel programs. In addition, they are responsible for adult basic education, adult high school, general education devel-

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opment testing (GED), new and expanding industry training, in-plant training, related apprenticeship programs, adult general and continuing education programs, along with the bulk of training under the Comprehensive Employment and Training Act of 1973 (CETA).

The North Carolina System is composed of 58 institutions of which 23 are community colleges and 35 are technical institutes/colleges. These institutions served an unduplicated headcount of 565,000 different persons during 1978-79, or over 14% of the state's population over the age of 18. This is one person in seven of all adults in the state. This age group of 18 and above is the age cohort that the community colleges are charged with serving in North Carolina. This level of service would only be possible in a state where industrial development is a high priority goal, where institutions are within a 30 mile commuting distance of 99% of the population, and where the staff and faculty in each institution clearly see and understand their missions.

North Carolina pioneered in the elementary and secondary school annual testing program as well as in the required basic high school competency exam prior to graduation. Along with the development of community schools in North Carolina and an emphasis on innovation and non-standard delivery (as is being developed under the Rural Renaissance Project in 10 community colleges and technical institutes), North Carolina can lead the way in lifelong education opportunity for all its citizens.

This North Carolina Assembly in Winston-Salem is one of four state assemblies being scheduled during 1980 and 1981. One of the major purposes of these assemblies is to develop more detailed and specific recommendations related to lifelong education that are tailored to fit the needs of a particular state. We must show the rest of the nation that this recognition of North Carolina was no accident.

In approaching this assignment, I reviewed *Policies for Lifelong Education: Report of the 1979 Assembly, American Association of Community and Junior Colleges* and the 45 recommendations developed by the Assembly. Rather than repeat the total recommendation and then comment on each one in turn. I took the liberty of reducing each to one succinct sentence prior to each commentary. To relate the implications of these recommendations for the State of North Carolina is the purpose of this paper.

Community Colleges

The American Association of Community and Junior Colleges at its 1979 Assembly recommended that *community colleges:*

1. Adopt policies and practices that foster lifelong education.

The policy framework for the operation of North Carolina's community colleges is quite amenable to serving the needs of lifelong education. The statement in the North Carolina Constitution concerning education, the 1979 revision of state statute embodied in Chapter 115D, and the North Carolina Administrative Code adopted by the State Board of Education, provide a flexible framework. The real job of meeting the needs of people exists on the local level. Local institutions need to periodically examine their rules and regulations to ensure that their policies do not operate as barriers to lifelong education activities. The framework is there at the state level. It is up to the local community colleges and technical institutes to implement in accordance with their local community needs.

We must not forget with whom we are dealing. *The Profile of North Carolina Community College and Technical Institute Students* by Ronald W. Shearon, et al. (1980), gives us current data on who the students are who are being served and what the differences are between students enrolled in curriculum and continuing education programs. We also know how student profiles are changing and what factors are presently in operation in our community colleges and technical institutes that attract students to them. Data such as these can be

used to take a more critical look at institutional policies—recruitment, information services, counseling, and the operation of evening and off-campus programs for curriculum and extension students. The major conclusions of the Shearon study noted that:

North Carolina Community Colleges and Technical Institutes:

- serve a mature adult student population
- enroll students who perceive their local institution as the major vehicle for educational opportunity
- are "on target in providing occupational training for the people of North Carolina"
- have a large proportion of students who are unaware of the support services that are available
- are attractive to students because of the programs available, location and low cost
- have been undergoing a change in the nature of their comprehensiveness
- generally serve an increasingly representative cross section of the state's adult population
- serve unique sub-populations that are not by themselves representative of the state adult population
- are undertaking recruitment efforts that weigh heavily in students' decisions to attend
- will find it necessary to offer programs in locations even more accessible to students in the years ahead, and
- are encouraging lifelong learning rather than one time only enrollments.

These conclusions about the students served in the North Carolina community colleges and technical institutes should have a direct bearing on the presidents and trustees in the community college system as they consider the policies and guidelines that they develop for use in the 1980's.

2. Join hands with other groups to meet community needs identified through local needs assessments.

Do you and the staff of your institution know the reasons why students are enrolled in your particular local community college or technical institute? Do you know what factors influenced their enrollment or how much factual knowledge the public has about your institution? Do you know how important public transportation is or what effect the presence or lack of it has on enrollment at your institution? What is the informal or gut-level reaction about the quality of the educational opportunities available at your institution? Are there any specific barriers in the minds of people who are attending your institution? Is your institution viewed as a racially discriminatory institution and one in which minority persons are not welcome? How relevant is the programming that you offer to the local needs of business and industry? How would persons in your service area react to self-instructional techniques or television instruction or other nontraditional delivery systems? These and a host of other questions need answering in each community in which our local institutions serve.

Community-based education implies joining hands with groups in the community to develop cooperative links with individuals and with various organizations and agencies. Community colleges and technical institutes in North Carolina, with their open door policies, their low tuitions, their accessibility to 99% of the population, and their programs that meet community needs, should be the types of institutions in the community that could serve as catalysts for ensuring the lifelong pursuit of education by citizens of North Carolina.

3. Translate local needs into priority statements and present these to local, state, and national funding agencies.

How can you present priority statements of local needs to state and national funding agencies if you don't know what the local needs are? Each institution should have an increasingly significant institutional research component operating in cooperation with the local chamber of commerce, the local economic development office, or the county or area planning office. Through these linkages, important data can be gathered and priorities can be set within funds available. Each community college and technical institute also should have an increasingly signifi-

cant role in resource development. We are not going to be able to meet the needs of our local communities with available state and local funds alone. It will take a knowledge of outside funding sources, such as foundations and the federal government, along with other existing local funds, to provide the needs in each local community. An institution will be better equipped to obtain these funds if it has its local needs in priority order and readily identified. These needs can then be used to make presentations and solicit funds on a continuing basis as the needs of women, minorities, senior citizens, the underemployed, and handicapped are identified.

4. Conduct community forums on lifelong education and publicize recommendations.

North Carolina has pioneered in this regard. An early set of hearings was conducted by Central Piedmont Community College in Charlotte and was broadcast live on June 5, 1979, throughout North Carolina. Through this approach, adult citizens may be heard and their needs expressed. In addition, their needs in programming can be identified. People who want and need educational services can express themselves. Many of the persons involved in such forums are non-students who are in great need of the types of programs that our institutions provide. Video-cassette summaries of the hearings, planning, and follow-up of the Charlotte project are available on loan from AACJC. All of our institutions could profit from reviewing this cassette, then conducting a similar local hearing or incorporating the community forum as part of an overall community needs assessment program.

The March, 1980, edition of the *Community and Junior College Journal* outlines a national program for community forums to be held in the fall of 1980. The six topics for discussion are:

a. What is meant by "education for community development"?
b. What is the nature and purpose of "community education"?
c. Who provides community education?
d. Whom does community education serve?
e. Who needs community education?
f. Who will pay for and control community education?

It is expected that each one of our institutions will hold a local forum to permit discussion on this topic of "education for community development." These forums could have great impact on North Carolina as we strive to realize our goal for lifelong education for all our citizens.

5. Define clientele to be served and shape programs that best meet consumer needs.

It is often difficult for some institutions to share what they believe is their "turf" and to collaborate with other agencies in the community to shape educational programs that will meet consumer needs. However, we know the percentage of people in our service areas in North Carolina that are in need of adult basic education. We also know the thousands of persons we serve who are without high school educations. Before we can raise the economic level of the citizens of North Carolina through appropriate occupational training, we must be sure they have the basic skills of mathematics and writing and speaking to profit from our programming. The community needs survey approach, discussed in recommendation 3, is a very significant way to meet this recommendation and determine community needs.

We often hear it said that we don't have time to do the analysis and the planning and the shaping of our programs because "we are too busy doing what we're doing." This is one of our problems. We do not have the time or the manpower or the funds to do everything that our communities need. It certainly is to our advantage to be aware of what other agencies in the community can provide and for the local community college or technical institute to provide services in the areas that it can do best.

6. Seek outside funding for professional development to prepare staff and counselors to better meet adult needs.

How many times have you heard it said that if we just had counselors that understand the world of work, the occupational needs of our

society, and the goals of students, how much better off we would be? How often have you heard people say if we could only get faculty members who know how to deal with the adult learner and that know how to relate to persons who are over the age of 30? These are both vital concerns to be addressed. However, with few exceptions, the people you are employing now are the people who will continue in the job. Therefore, staff development is crucial to the enhancement of lifelong learning in North Carolina.

The General Assembly in the last several sessions has not provided any additional funds for staff development in our institutions. It appears as though the only way these functions are going to be accomplished is through consortia of local institutions, recruitment of outside funds, Title III Programs, foundations and the like, and by taking advantage of organizations such as the National Council of Staff and Organizational Development of the American Association of Community and Junior Colleges. Educational or industrial leaves for counselors and faculty members are also extremely important in the professional development of faculty members, counselors, and administrators.

7. Make faculty better aware of their role in lifelong education and their impact on the adult learner.

Faculty need to be aware that many of the very students that we are trying to serve in lifelong education are relatively underprepared to meet the challenges of the new education that they desire. We have somewhere in the vicinity of 57 million people in our country who have not completed high school. Furthermore, in North Carolina, roughly 25 percent of the adult population is functionally illiterate. Faculty and staff members need to be sensitive to the needs of these learners. Developmental education in one form or another will normally be required by approximately one-third of all the students who enter our institutions. All faculty members, therefore, are not going to be dealing with the brightest and most capable people in all of their classes.

To make the job of faculty in our institutions more tolerable, however, we need to devote much more attention to the assessment and intake of students. One of the funding sources that is oftentimes available for assessment capabilities is the funds provided by the local prime sponsors or balance-of-state prime sponsors under CETA. Part of our long-range planning as well as institutional research and budget preparation should provide opportunities for faculty and staff to become more aware of their responsibilities in dealing with adult learners and more aware of the needs of the adult learners.

8. Take the initiative through the office of the president in seeking outside funds and join with other agencies to establish a community educational information center.

This recommendation speaks to a difficult, yet rewarding task. It proposes that representatives from other organizations and institutions in the community be brought together under the initiative of the local community college or technical institute, and that a community educational information center be established. Funds to establish such centers could come from Title I of the Higher Education Act or from CETA funding.

I have had experience with a center of this nature that was named the "One-Stop Job Education Center." One of the things that lifelong learners get tired of is spending a lifetime trying to find the answers to the concerns that they have. Example: the questions of senior citizens, the handicapped; those in need of student financial aid; those in need of testing, counseling, and assessment; those desiring services from vocational rehabilitation; or those who need employment service thus are very specialized in nature. However, the compartmentalization of departments and bureaucracies in our society is such that each one tends to be familiar with and knowledgeable of only that to which it is directly assigned. Therefore, the person is shuttled or directed or moved from place to place and may have to deal with four or five locations before receiving the answers to one question. They

then become disenchanted and worn out. If funds can be provided in a community with outside support and if persons from the various agencies are out-stationed in a location near the center of town or near public transportation, the magnitude of these concerns can be alleviated to a great extent.

9. Take the lead through the trustees in developing and interpreting policies to facilitate lifelong learning services.

This recommendation speaks to the role of the membership of our boards of trustees. It requests them to familiarize themselves with local needs and to provide local leadership in developing policies so that lifelong learning can be realized. Trustees are leaders in our community. They are highly respected and are involved in many other community pursuits in addition to their activities with the local community college or technical institute. Trustees, through their involvement in local activities as well as through their role in developing and approving policy statements in our local institutions, should consider the impact of the policies on the facilitation of services to all citizens without regard to their age, sex, economic condition, or other barriers.

American Association of Community and Junior Colleges

The American Association of Community and Junior Colleges (AACJC) 1979 Assembly recommended that *AACJC:*

1. Request the President of the United States to include the concept of a learning society in United States positions on domestic and international human rights.

A good start has been made in that the 1979 AACJC Assembly on Lifelong Education developed a bill of rights for lifelong learners in which it was stated that:

- Every adult American has the right to continue to learn throughout life;
- Every adult American has the right to equal opportunity for access to relevant learning opportunities at each stage of life;
- Diversity and access to educational opportunity are important to democracy in the United States;
- Any index of the quality of life in the United States includes opportunities for growth and self-actualization as a right of the learning society;
- Neither age, nor sex, nor color, nor creed, nor ethnic background, nor marital status, nor economic status, nor disability should create barriers to the opportunity to continue to grow through participation in organized learning activities;
- Coping, living, and working are dimensions which exemplify the range of learning needs of the learning society; and
- Public investment in the learning society is an investment in human capital and in the human condition.

This type of statement and proper approaches to the office of the President of the United States by AACJC should be useful in accomplishing this recommendation.

2. Request the President of the United States to convene a White House Conference on Lifelong Learning.

Coupled with the bill of rights for the lifelong learner as outlined in Recommendation 1 above, this request could give some needed visibility to lifelong education in national policy. It could also focus attention on a national scale to the needs of the lifelong learner.

The National Advisory Council on Extension and Continuing Education is a presidential council established by Congress. On September 30, 1979, the National Advisory Council made a special report to the President and to Congress in the area of lifelong education. Unfortunately, there was not any representation on the presidential council from two-year colleges and technical institutes. The bulk of the people representing education were from the university level. Steps should be taken by the AACJC prior to the convening of any White House Conference on Lifelong Learning to ensure that the views of the two-year colleges are better

represented in our national circles and before the President of the United States.

3. Approach outside funding sources such as the National Institute of Education (NIE) to support development of additional national clearinghouse services on lifelong education topics.

The *Community Services Catalyst*, the journal of the National Council on Community Services and Continuing Education of the American Association of Community and Junior Colleges, contains a clearinghouse entitled *Catalyst Exchange*. The *Catalyst Exchange* is "an idea/information sharing exchange about successful innovative programs in community services and continuing education." Another valuable national exchange is entitled *Community-Based Programs that Work*. This Exchange is conducted by COMBASE, a cooperative for the advancement of community-based post-secondary education. This Exchange has been in existence since 1977 and contains useful descriptions of community-based programs that work in communities throughout the United States. Probably the oldest and best known clearinghouse for junior colleges is ERIC, the Educational Resources Information Center at the University of California at Los Angeles. While ERIC is not solely a clearinghouse for continuing education and community service programming, it does have a considerable amount of data in these areas. With these models in existence and with a national commitment, agencies such as the National Institute of Education or the W.K. Kellogg Foundation could be encouraged to support a national clearinghouse on lifelong education topics.

4. Request the President of the United States to keynote an AACJC-sponsored "National Issues Forum" as a model for a series of community forums on lifelong education involving a diverse number of community groups.

The 1979 Assembly recommended that AACJC ask the President to announce the beginning of the planned fall community forums program through the use of the mass media. We, in North Carolina, are mindful of the fact that this fall the country will be engaged in a presidential election campaign. This may or may not be the time for such a national issues forum to gain deserved public attention. However, the fall of 1980 is clearly established as the time for community colleges across the country to conduct community forums in their own locations.

AACJC has also received a small grant from the W.K. Kellogg Foundation for a mini-course by newspaper program on these same six topics identified in the education for community development theme, and it will be timed for use with local community forums in the fall and winter.

It would be well to note at this point that the 1980 AACJC annual meeting much discussion centered on the mission of the Association. A draft was developed in which the mission statement was formed as follows:

> *Mission:* The mission of the American Association of Community and Junior Colleges is to organize national leadership and services for lifelong education for individual and community development.

You will note the twin focus on lifelong education and community development as stated in the proposed mission of AACJC for the 1980's. Furthermore, continuing objectives to support this mission statement were discussed as follows:

- To encompass in membership as fully as possible all community, junior, and technical colleges.
- To represent the interests of member institutions in Washington at foundations and other decision-making centers of national significance.
- To encourage working relationships among other institutions and agencies at local, state, national, and international levels having similar concerns for individual and community development.
- To promote the growth, acceptance, and effective practice of the concept of lifelong education for individual and community development.

- To alert member institutions to trends and issues which present significant opportunities or constraints and to make policy recommendations.
- To provide vigorous, national leadership in education for employment and economic development.
- To provide leadership in making available that education which enhances the quality of life for the individual in the community.

Those of us in North Carolina will note the emphasis placed upon employment and economic development, cooperative working relationships, and lifelong education—which are hallmarks of the operation of our system here in North Carolina.

AACJC, in 1978, under a grant from the W.K. Kellogg Foundation, initiated its Policies for Lifelong Education project, designed to bring about improvements in policies and to encourage greater commitment to lifelong education. This center is helping to support the proposed mission and continuing objectives of AACJC, along with its other functions. In addition to the national and state assemblies in which we are involved, the project is focusing on the dissemination and publication of the recommendations that we reach. Furthermore, the center is promoting public hearings as a part of local needs assessments. Staff are available to give interested local institutions technical assistance on how to plan and conduct these hearings. The project also has done research among community colleges and technical institutes to determine the number of existing cooperative agreements that presently are in force between community colleges and local community agencies or groups. Their survey sample indicates that the typical institution has already in place 99 such cooperative agreements. Larger institutions have up to 1,000. In addition, of course, the fall community forums, the simultaneous course by newspaper on education for community development, coupled with the recent field-based description of the future community college by Edmund Gleazer, all serve to support the mission and continuing objectives of AACJC.

5. Continue to work with the national Chamber of Commerce and other groups to develop improved linkages between business and community colleges to advance lifelong education.

Two of the forums of last year's AACJC convention demonstrated an increased emphasis in this area. They were entitled *Community Colleges and Chambers of Commerce: Partners in Community Growth* and *Articulating with Industry: The Role of Vocational Education and Economic Development*. In North Carolina, we are most concerned with economic development and its relationship to the community college or technical institute. This has long been a leading objective of our institutions.

We were most pleased to read in the March 24, 1980, edition of the *Chronicle of Higher Education* an article entitled "Drive to End Shortage of Skilled Workers Proposed by Educators and Industrialists." The article contained recommendations of an Assembly sponsored by AACJC, the American Vocational Association (AVA), and the American Society for Training and Development (ASTD). The conference delegates called for:

- A national program to define job markets and provide information on which to base cooperative training and education programs;
- A national commitment to continuing education programs that would help workers upgrade their skills and attitudes, and train for new positions;
- Education delivery systems such as competency-based instruction that would permit students to enter and transfer to or from any high school, post-secondary school, military labor or industrial education program; and
- A program to identify and publicize effective working relationships that education and industry have already established.

This Conference also called on other organizations, such as the U.S. Chamber of Commerce and the National Alliance of Business (NAB), to support a national effort to facilitate industry-education collabora-

tion. We, in North Carolina, would agree wholeheartedly with the objectives outlined at this Assembly. We also should seek to implement them with our local chambers of commerce, local industrial development leaders, and local chapter of the National Alliance of Business (NAB).

6. Provide leadership in starting a coalition of national groups concerned with furthering lifelong education and examining the prime forces impinging on lifelong education.

This recommendation urges AACJC to take the lead in developing such a coalition. To my knowledge, no steps have been taken along this line. However, AACJC does belong to a coalition of adult education organizations (CAEO) along with 24 other agencies interested in promoting adult education. This coalition was formed in 1970. Suzanne Fletcher of the Center for Community Education at AACJC is presently vice president of the group. If this recommendation is going to be implemented, it would seem that an organized follow-up from the national and state assemblies is needed, with a three- to five-year long-range plan and an annual work plan tied to the mission and continuing objectives of AACJC.

7. Promote and foster among its member institutions cooperative community-based approaches in the delivery and development of lifelong education services.

Among the projects that provide technical assistance to our institutions in North Carolina in the area of lifelong education are AACJC programs in the area of policies for lifelong education, minority women and small business, cooperative programming with the Small Business Administration, the Older Americans Project, the Center for Community Education, the Energy and the Way We Live Forum, and the community forums and courses by newspaper projects. Most of these projets have had support from private foundations or government agencies. All of these projects have provided technical assistance to institutions here in North Carolina.

8. Communicate directly with the learners and obtain their input as policies on lifelong education are developed.

We would hope that in attaining this objective that AACJC would seek to receive the input of students—leaders in our institutions as well as students who belong to the U.S. Association of Evening Students and other organizations. The participation of people who are engaged in lifelong education is essential in developing the overall policies. One of the problems encountered in this approach, however, is when we ask to hear from the people being served, we often miss the people who are not being served. These are the persons for whom barriers have been erected. For instance, in student financial aid, the U.S. Office of Education does not provide assistance to students in our institutions who are enrolled on less than a half-time, six credit hour basis; it does not provide assistance to students who are not enrolled in a degree or certificate oriented program in which academic credit is being earned; and it does not provide assistance to students who do not meet financial need eligibility guidelines. Thus, some people are being missed. However, the state of North Carolina, through its low tuition program and program of extension courses, has tried to consider the needs of all students in setting its tuition program. Since the establishment of the commuity college system in North Carolina 17 years ago, the quarterly tuition rate has increased approximately $17.00 during those 17 years. This is to the great credit of the state in reaching the lifelong learner.

9. Work with the national organizations of governors, mayors, and state legislators to seek implementation of policies more favorable to lifelong education.

To this recommendation, I would add the need of AACJC to work cooperatively with the regional organizations such as the Southern Regional Education Board (SREB) and the Western Interstate Compact for Higher Education (WICHE). Since it is the spokesman for two-year colleges in our country,

AACJC would be the most effective institution to work with these regional organizations. The Center for Community Education at AACJC has worked cooperatively in the last several years with the U.S. Conference of Mayors in assisting with programs in community education and community development for urban areas. This is an example of the types of activities that should be enlarged and extended by AACJC in working with other groups at the national level.

State and Federal Governments

The American Association of Community and Junior Colleges (AACJC) 1979 Assembly recommended that *state and federal governments:*

1. Strive for the goal of providing appropriate opportunities for lifelong learning for all citizens without regard to previous training, sex, age, handicap, ethnic background, or economic circumstances.

Community colleges in North Carolina are committed to this goal. This was highlighted by Clark Kerr in his keynote address to the 1980 AACJC Convention. He noted that the next two decades can be times of great expectations and great challenge. He called the period of the 80's and 90's the period of renewal. A period in which we would need to help secondary schools because they were not working well and furthermore we would need to adapt to new students. He predicted that by 1990 25 to 30 percent of all students enrolled in higher education would be minority students.

Dr. Gleazer in his book noted that "36 percent of the U.S. population between the ages of 16 and 65 is in a career transition status." These people are largely the unemployed people looking for work or the people dissatisfied with their current jobs and considering new careers. These are precisely the people who can profit most from North Carolina's community colleges and technical institutes.

2. Review the Higher Education Act as amended in 1976 by Congress and revise the current law into a more effective lifelong education act.

The Higher Education Act is currently undergoing congressional reauthorization. Representatives of AACJC have been invited by the House Subcommittee on Postsecondary Education to testify specifically concerning Title I of the Higher Education Act, which concerns itself with community services and continuing education. In North Carolina, the bulk of the funding under Title I has gone to universities and four-year colleges. Since the inception of Title I legislation in the 1970's, approximately five percent of the funds allocated to North Carolina have been allocated to community colleges and technical institutes. Another point to remember is it's one thing to have legislation written and it's another thing to have funding authorized to support the legislation previously written. Title I(B), Section 131(8) of the Higher Education Act states that "American society should have as a goal the availability of appropriate opportunities for lifelong learning for all of its citizens without regard to restrictions or previous education or training, sex, age, handicapping conditions, social or ethnic background, or economic circumstances."

The reality is that we are not at this point as yet. Congress will need to revise the Higher Education Act and authorize appropriate funding if the needed impact on lifelong learning is to occur here in North Carolina.

3. Enact an "Urban Extension Act" to provide funding incentives for the development of urban extension programs similar to the cooperative extension programs in rural areas.

Dale Parnell, in an article in the *Community and Junior College Journal* entitled "Urban Extension Act: Needed Federal Support," brought this concept to our attention. He noted that the resources of the federal government must be brought to bear on the problems of urban areas more directly than have most projects under Title I of the

Higher Education Act. He noted that, unfortunately, most of the money under Title I of the Higher Education Act has gone to the graduate schools of our universities for research. He advocates that it's "time to move from research into action." Parnell notes that "more community-based need studies and urban prototypes are required. City governments and community colleges are ready-made partners to join together in efforts aimed at our urban society and the demands of a complex urban life. The resources of the federal government are required. But an even greater requirement would be city and community college leaders who see the potential of a new cooperative effort."

It's a long way from Manteo to Murphy, with many rural areas in between. Nonetheless, the Urban Extension Act, if written to apply to urban places over, say, 20,000-25,000 population, could have a positive impact upon North Carolina.

4. Establish and support interstate cooperative projects on lifelong education through state boards and coordinating agencies.

Agencies such as the Southern Regional Education Board (SREB) and the Western Interstate Compact for Higher Education (WICHE) do exist and could assist in this area. The state boards and coordinating agencies must bring to the attention of these groups and others, such as the National Center for Higher Education Management Systems (NCHEMS), that lifelong education is indeed an important area of study. Oftentimes, these regional and national groups focus on funding mechanisms, enrollment reports, program reviews, and the like, which are the top needs and priorities identified by their constituencies. Frequently, the studies and models developed by these agencies tend to be more traditional in form and do not present the overall breadth of topics and indicators that would be necessary to address the concerns of the lifelong learner.

5. Develop funding models at the state level to facilitate lifelong education in both the public and private sectors.

In 1979, the Board of Governors of the California Community Colleges developed a long-term finance plan: *Recommendations for the 1980's*. In developing the plan, the Board noted that 20 of the states, mostly those with a small number of community colleges, use negotiated budgets or aggregate cost methods rather than formulas for distributing state monies to community colleges. The remaining 30 states use a formula method of funding. These 30 states fall into two categories: (1) those states that use a single funding rate for instruction—10 states, and (2) those that use multiple rates for instruction—20 states. The larger states with a system of over 25 community colleges tend to use multiple instructional rate formulas. Multiple instructional rate formulas are the most frequently used allocation techniques across the 50 states. The most noticeable trend the Californians encountered was toward greater use of multiple instructional rate formulas by other states.

Most of the available data are based on full-time students. California studied eight states in revising its finance plan in the wake of Proposition 13—the property tax-cutting measure that eroded local support for community colleges. These states were: Florida, Illinois, Maryland, Minnesota, New York, Texas, Virginia, and Washington. Each of the eight states maintains a mission statement similar to that of the California community colleges. "In theory, most states view the elements of their mission as having equal priority (Virginia is the notable exception). One notable exception to lack of prioritization is in the area of 'non-credit instruction.' None of the other eight states provide support for instruction which is directed at meeting avocational or recreational needs of the community." With these data in mind and the realities of funding in sight, it is evident that there is a long way to go before total lifelong education is a reality throughout the 50 states.

6. Develop communication networks and coordinated planning between public and private agencies with state agencies responsible for lifelong education taking the lead.

This recommendation gets back to the need for communication, articulation, and coordination among agencies involved in lifelong education. This is not an easy task; in fact, it is one of the most difficult tasks that exists in lifelong education planning. One of the continuing objectives supporting the proposed revised mission of AACJC for the 1980's is "to encourage working relationships among other institutions and agencies at local, state, national and international levels having similar concerns for individual and community development." This continuing objective must be reached if lifelong education is to attain the level of involvement that we all desire.

7. Direct each state under the aegis of the Education Commission of the States (ECS) to develop a positive forward-looking master plan that takes into account lifelong education needs.

In reviewing accountability and master planning for its statewide finance plan, the California Community Colleges Board of Governors noted that "most state officials feel that their master planning process is either lacking or nonexistent." Very few states incorporate output measures into their planning efforts. Those states that do tend to rely on the number of degrees and certificates awarded. Illinois uses the greatest number of elements in its planning and resource allocation process for community colleges. Since many states do not have the broad programmatic assignment that North Carolina has, and since definitions are weak nationwide in what constitutes lifelong education, community education or avocational and recreational instruction, much spade work must be done before this recommendation could be implemented. For this to work, lifelong education must be operationalized and made to sound useful and valuable to the legislators and other policy makers in each state. Some high-flown philosophical statement developed in Europe, Asia, or at the United Nations may not set well with legislators and other policy makers and create just the opposite effect of what was intended.

One of the most interesting approaches to overall planning for the 1980's involving community colleges was the recently completed Carnegie Council on Policy Studies in Higher Education study entitled, *Giving Youth a Better Chance: Options for Education, Work and Service*. In a move back to what some might call the "good old days," the Carnegie Council noted that "we must find ways to break up the big monolithic high school and its deadly weekly routine. We believe that instruction in the basic skills and general knowledge can be concentrated without loss of achievement in three effectively used days per week." The Council also encouraged earlier entry from high school into college and additional programs combining the last year or two of high school with college. The North Carolina State Board of Education, through a 1979 amendment to the *North Carolina Administrative Code*, has greatly facilitated this concept by providing for early admission and joint enrollment between high schools and community colleges and technical institutes in North Carolina.

In dealing with community colleges and technical institutes, however, the Council recommended that "we should concentrate most applied skill training at the post-secondary level and particularly in community colleges." In addition, the Council recommended that "we create programs in community colleges where young persons can be prepared for jobs and placed in jobs on a part-time basis while attending college." Thus, they spoke broadly to the community college and its role and responsibility for youth. In terms of planning and master planning, the Council noted that "this role for youth can become the sixth great role for the community college in addition to: (a) academic transfer programs, (b) technical training, (c) terminal general education, (d) community service programs instruction in non-academic, non-vocational subjects as requested by members of the community, and (e) community-based programs such as conferences and cultural events." This approach of the Carnegie Council would tie in directly with the pol-

icies, practices, and goals of the North Carolina Community College System and it should be studied with great care for possible implementation.

8. Revise state aid formulas, student financial aid formulas and tuition charges to accommodate lifelong education so that there are provisions for activities like state aid to part-time students and revised standards for determining aid to independent students.

If this recommendation is going to succeed, lifelong learning must be operationalized and made to sound useful, valuable, and needed in North Carolina. Times of recession and higher levels of unemployment are precisely the times when people most need lifelong education to qualify for jobs that require more advanced training and thus become more flexible in the job market. However, a conflict exists here since state and federal governments tend to have fewer funds available to distribute at these times.

While many lifelong learners are part-time students, it was pointed out by one expert in 1977 that "part-time students are full-time voters." Another fact worth noting is that lifelong learners tend to be older and those persons in their 30's and 40's tend to have far better voting records than people 18-25 years of age.

Before state aid formulas can be revised to accommodate lifelong education, the persons who devise these formulas must be convinced that education is more than just a one-time thing that someone gets in elementary school, high school, and after one "shot" at a community or four-year college.

We need to point out something that is already well known. People will change their occupations a minimum of three to five times during their working lifetimes. Redirection of these persons is going to be a necessity. Many of the occupations people will need to be trained for during the 80's and 90's have not yet been created. Other factors are that 10 to 15 percent of the students currently enrolled in North Carolina's community colleges and technical institutes already possess a baccalaureate degree or higher. We are already experiencing retraining of people in their early 20's since North Carolina certified over 5,000 teachers last year while having jobs for approximately 1,900.

In the area of tuition in North Carolina's community colleges and technical institutes, we are in a most enviable position as compared with other states. We certainly have done the job in carrying the message to the legislators and policy makers in terms of the impact of the barrier of high tuition to meeting lifelong educational needs. The data in the Shearon study on a *Profile of Students in North Carolina Community Colleges and Technical Institutes (1980)* would be most helpful in supporting recommendations in this area.

9. Allocate federal funds to the states to conduct an on-going educational needs assessment, as well as a system of educational brokering using the agricultural extension service as a model where appropriate.

The topics in this recommendation were spoken to in an interesting way by Robert Glover in his *Report of the National Forum on Learning in the American Future: Future Needs and Goals for Adult Learning 1980-2000*. This is a report of the College Entrance Examination Board (CEEB) and their future directions for a learning society, which was funded by a grant from the Exxon Education Foundation. The forum agreed that "lifelong learning should be a high priority future goal, increasing in importance from 1980 through the year 2000 in the time, money, and effort invested in adult learning." Educational brokering was ranked as a low present and low future priority. Resistance reflected in the comments seems to argue that educational brokering is an unnecessary duplication of services offered by schools and colleges, and that accurate information about available opportunities rather than bias counseling is the problem. They pointed out that "brokering might not be as important as once thought because of higher education, consumerism, and increasing pressure on colleges to maintain enrollment." Also, they noted that "too many duplicate organizations exist. Excellent

service could be provided through consolidation." Notice the emphasis put on *accurate information* about *available opportunities*.

In a recent study of North Carolina high school dropouts conducted by the Research Triangle Institute, approximately 41 percent of those interviewed said that the reason they had not taken advantage of vocational or occupational programming in the community colleges or technical institutes of North Carolina was that "the thought hadn't occurred to me."

In the Future Directions for Learning Society report, the highest present priority and highest future priority went to the following statement: "to provide learning opportunities for people of all ages and conditions in life, suited to their own individual needs and aspirations." In relating to this statement in a practical way, however, the forum noted that many community colleges were already doing this effectively. "Individual needs and aspirations must be geared to available jobs; learning opportunities are not enough."

The agricultural extension service may be an appropriate model, and it is cited by Dale Parnell as a model for the urban extension act. However, his proposed concept of educational brokering is not uniformly supported. From my experience, though, the notion of on-going educational needs assessment on a state and local basis would be supported and is needed.

10. Establish a task force on lifelong education within each state to ensure continual dialogue, improve the delivery system, conduct local community forums, and establish community task forces on lifelong education.

The suggestion to establish task forces that focus on lifelong education was made to the governors of the remaining 49 states by Governor James B. Hunt of North Carolina following the 1979 AACJC assembly on lifelong education. In the recommendations contained in *Total Education: The Duty of the State*, North Carolina has an outstanding blueprint to base the dialogue upon in the conduct of community forums. Jamison Gilder, in her *Lifelong Education: The Critical Policy Questions* (1980), spoke to this issue when she said, "Still another problem is the need to demonstrate to taxpayers and legislators that lifelong learning is of economic value and deserves high priority in times of tight budgets. Measures of learning, productivity, and outcomes that have meaning for the public are needed. Community colleges and other agencies offering lifelong learning must be prepared to report to the public the results of their services in terms the public can understand and support."

The topics for task force consideration and community forum debate are also well set out in a survey conducted recently by Edmund Gleazer when he surveyed 400 community college presidents and asked them to indicate the issues of concern for the community colleges in the 1980's. Among the major future problems identified were: (1) changes in financing and fiscal arrangements, (2) the need to clarify and revise mission statements, (3) loss of local control over community colleges, and (4) proliferation of specialized accreditation programs.

The establishment of a North Carolina task force on lifelong education would certainly be an appropriate activity in 1981 following the establishment of the State Board for Community and Technical Colleges. Building on the strength of the past—under the State Board of Education—the new state board could utilize such a task force to assist in planning a program for the 1980's as well as in implementing the goals in *Total Education: The Duty of the State*.

11. Orient presently funded manpower programs, such as CETA, as much as possible along the lines of lifelong education.

CETA programs in North Carolina have given a tremendous boost to the concept of lifelong education. They have supported in great measure training for youth, the disadvantaged, minorities, women, and the handicapped. Funds have been provided for linkage studies between public schools and community colleges, as well as for centers for displaced homemakers and job training for persons with limited English-speaking backgrounds. Even in the area of Title II and

Title VI, public service employment, the persons hired under CETA funding by state and local government or nonprofit organizations must now set aside approximately 20 percent of their work schedule for training. The concept of employment and training as established by the North Carolina Employment and Training Council and as implemented by the local prime sponsors and balance-of-state prime sponsor for CETA programs in North Carolina is focused and is directed toward employment and training of those persons who are CETA eligible. While it still can be improved, the policy framework appears to be tied rather well to the policies and needs of lifelong learners in North Carolina.

12. Develop policy guidelines at the federal level for the improvement of information sharing, communications, consultation, and planning for federally supported lifelong educational efforts.

This recommendation would be of great benefit to North Carolina as would the improvement of the overall federally supported lifelong educational effort under a revised Title I or under a newly enacted urban extension act. Too much of lifelong educational research and activities are compartmentalized along the lines of universities, community colleges, community education groups, public schools, and other agencies. Knowledge of the information gained and communication that would provide improved models and planning at the local level would be highly desirable.

13. Allocate funds through the National Institute of Education (NIE) to fund further research on lifelong education efforts to include cost-benefit studies.

In March of 1980, Herbert E. Striner, in a paper prepared for the joint AACJC, AVA, and ASTD Conference in Racine, Wisconsin, said that the United States "must adopt a philosophy which sees education and training throughout life as an absolutely necessary national investment in human resource development. Without such an investment strategy, we will continue to be plagued with unemployment, underemployment, low productivity, and inflation." We must have a cost-benefit analysis of the value of lifelong education to our society through knowledgeable research or the goals which we seek will not be forthcoming because they won't sell.

There are more organized ways to learn today than ever before. These methods are often in constant competition with one another. We have a tremendous need to overcome the absence of basic skills and weakness in the three R's among our adult population. We know that 85 percent of the jobs that will become available in the 1980's will require an associate degree or less. This puts the community colleges and technical institutes of North Carolina right on target.

We are also seeing an increasingly growing number of professional areas that require recertification every three to five years to maintain licensure. Engineers, dental hygienists, nurses, pharmacists, lawyers, physicians—all face such prospects. Many more occupations will be added to this list by legislative or licensing board action. The community colleges and technical institutes of North Carolina can fill a tremendous need because even if these persons stay in the same job, lifelong education is a *requirement* for them to stay current.

Certainly no better cost-benefit could occur than for community colleges and technical institutes to work with employers to develop classes on campus or in-plant to enroll existing employees in the skills building areas that are needed. Classes could be conducted by contract with businesses to cover fees, books, and supplies. In addition, they could be offered before or after work, especially on a shift basis, as in a plant or factory. One of the important areas often overlooked in a cost-benefit presentation is that these classes set up for groups of existing employees should include employees of city, county, state, and federal governments as well. The secretary, as well as the sanitary engineer, needs continual skills updating.

Cooperative education and cooperative apprenticeship programs most appropriately can fill the needs of the lifelong learner and are very much a part of our planning in

North Carolina. In addition, the need for open-entry and open-exit programs must be developed and be more widely used. These can be based on competencies so that different learners may be in the same group and be at different levels, and the instructor can then become a "facilitator" rather than a "professor" in meeting their needs. This will also promote closer program articulation between community colleges and high schools in North Carolina.

Another cost-benefit point is that our institutions could better use assessment of prior learning experiences. We need to revise and publicize our institutional testing programs, and particularly to adopt prior learning testing activities that have been proven, such as the college level examination programs (CLEP).

The National Institute of Education (NIE) and the W.K. Kellogg Foundation would be appropriate resources for the resource development officers in North Carolina community colleges and technical institutes to consider for providing funds to conduct cost-benefit studies of the value of lifelong education training in our system.

14. Revise the federal income tax laws to provide federal income tax deductions for education expenditures for credit, noncredit, vocational, and avocational programs.

This recommendation hits right at the pocketbook. The age old question would be: If this tax deduction were adopted, how would the federal government make up the lost revenue at a time when it is attempting to balance the budget? The American Society for Training and Development (ASTD) recently successfully introduced a tax reform bill to change the Internal Revenue Service (IRS) treatment of employer education assistance as taxable employee income. If an urban extension act or a proper revision of the Higher Education Act is really important to Congress, that body certainly could consider such an income tax deduction as well.

Whether or not this income tax deduction would extend to credit, noncredit, vocational, and avocational programs is questionable. Congress would likely tie it to directly related job improvement and job seeking skills; therefore, the lawmakers would have to draw a line somewhere. In keeping with past practices, no doubt they would make a distinction between credit and noncredit or between vocational skill building and avocational programs, allowing a deduction for the one but not for the other. Such a deduction could be a boon to North Carolina, especially if its income tax laws were similarly revised.

15. Revise legal and procedural restrictions regarding lifelong education at both the state and federal levels by eliminating prohibitions against unemployment insurance beneficiaries enrolling in educational programs and restrictive welfare policies that impede participation in lifelong education.

I am not sure how this recommendation would be accepted in North Carolina. Many of our citizens feel that the current welfare program is a give-away, and that there aren't enough restrictions on the program. For this recommendation to meet any degree of success in North Carolina, it would have to build upon programs, such as the Work Incentive Program (WIN), and be directly tied to a person obtaining needed job skills for work on a full-time basis, which would get the individual off the welfare rolls and on the tax rolls of the state and federal government. If these linkages could be shown, then most of the citizens of North Carolina would likely be supportive of lifting these legal and procedural restrictions.

The main problem is that a person can do well enough on unemployment benefits, food stamps, aid to dependent children, and other welfare benefits that the incentive of being trained and becoming a productive worker is often missing. And rather than blame the individual, he or she should be congratulated for taking advantage of all available opportunities. But certainly lifelong education and the motivation and encouragement that goes along with it is a key to the breaking of this unemployment, underemployment, and welfare cycle.

16. Encourage accrediting and licensing bodies to take into account lifelong education policies in their review processes.

The Southern Association of Colleges and Schools, the regional accrediting agency in the south, has developed over the last several years a standard or evaluative criteria to address lifelong education dealing with special activities. Special activities programs are defined as "external or special degree programs; off-campus classes and units; independent study programs; correspondence and home study, conferences and institutes; short courses and workshops; foreign travel and study; media instruction including radio and television; on-campus programs." The objective of this standard is to permit institutions to function properly in the area of lifelong education. It is very significant that the Southern Association "does not wish to be restrictive regarding new special activities programs of a member institution but rather seeks to encourage innovation and an imaginative approach to providing quality instruction according to the educational needs of the colleges and constituents." The Southern Association has therefore taken lifelong education into account in developing its standards for accreditation and reaffirmation of accreditation of member institutions in the south.

The more difficult situation may exist with licensing boards and specialized programmatic accrediting bodies. These bodies are often related very directly to the profession that they serve and are likely to be less amenable to innovation that might take into account lifelong learner needs.

17. Strongly support the position that a well-funded lifelong education program is essential to the achievement of our national goals of lowering the rate of inflation, increasing productivity of workers, and decreasing unemployment.

This recommendation was supported and echoed by the recent assembly, cosponsored by AACJC, AVA, and the American Society for Training and Development (ASTD). Participants noted that lifelong education and training is an "absolutely necessary national investment." In addition, they call upon the President to call a White House conference to draw attention to the need for a national policy designed to increase the productivity of workers and to decrease unemployment. It must be shown that lifelong education is a benefit to society to the extent that it should be funded in the face of rising prison populations, increased pressures on social security, and rising health care costs. The competition that lifelong education faces from these other societal problems is tremendous. People in North Carolina would agree with the goals espoused in this recommendation. The key to their support would be to demonstrate that there is a positive relationship between these recommendations and goals and the results of lifelong education in our society.

18. Change the current patterns of funding used at the state level that are based upon the generation of full-time equivalent (FTE) students.

Part of the thinking here is that a majority of the students enrolled in the community colleges and technical institutes of North Carolina, as well as in the nation as a whole, now attend on a part-time basis; however, it takes as much effort to recruit, enroll, and maintain the records and library facilities for a person who attends part-time as it does for one who attends full-time. In the fall of 1978, part-time students comprised 61 percent of the students enrolled nationwide in credit programs in community colleges.

Another important concept in dealing with community college enrollments of minorities, handicapped, and older students is that more resources are required from the two-year colleges for these persons to be successful than for the traditional student coming to the community college right out of high school with high ability levels. We usually expect over one-third of the students in our North Carolina community colleges and technical institutes to need some type of developmental or remedial instruction at some point. The cost of this type of instruction—along with tutoring, testing, and other support services—is high. The fact is that many of these persons are part-time students

and thus generate less funding on a per person FTE formula; this means that the institutions are being short-changed to support this population and their greater needs.

Labor, Business, and Industry

The American Association of Community and Junior Colleges (AACJC) 1979 Assembly recommended that *labor, business, and industry:*

1. Recognize that educational development can profit from funds derived from business and industrial capitalization as well as from federal, state, local, and foundation sources.

This recommendation prods business, industry, and labor to be aware of the great potential of industrial capitalization in the area of lifelong education. It points out that many new markets for technological development in counseling, referral, and instruction are already producing large numbers of dollars for educational development. Certainly cooperative arrangements involving the training and development of personnel from business and industry are important. In addition, forums at the national and local levels that focus on the relations of business and industry to lifelong education are valuable. Business and industry must be convinced that unless corporations invest in the greatest resource of all—the human resource—the country will continue to be plagued with rising inflation, low worker productivity, underemployment, and high levels of unemployment. We must enter into cooperative projects that can demonstrate to our state and national leaders that our community colleges and technical institutes can train workers that business and industry can place either in an employment or cooperative employment mode. This may best be accomplished by local education-work councils or local private industry councils under the Comprehensive Employment and Training Act (CETA) in which educational institutions, business, and industry work together to assess the skills that are needed, to determine the number of jobs that are available, and to determine the training necessary to hold those jobs.

One of the ways that the task can be accomplished is to establish centers; go out into the community in a variety of locations. For example, during the period 1976 through 1978, Guilford Technical Institute operated programs in 205 different locations in Guilford County in 15 different categories of agencies, the largest of which were business and industries; also included in this category were public schools, rest and nursing homes, community centers, retail stores, governmental facilities, and churches.

Community colleges can't be allowed to ossify and become unduly regimented as many four-year colleges and universities have become. The success of our community colleges and technical institutes in North Carolina depends upon remaining current with the needs of business and industry. And this costs money. The only way it can truly be accomplished is with the support of business and industry over and above the support we receive from state and federal governments.

2. Provide periodic paid educational leaves to allow workers to participate in lifelong educational experiences throughout their work lives.

Some larger businesses in North Carolina already provide educational leaves; however, a recent survey conducted by the Greensboro Chamber of Commerce did not indicate that this was widespread among businesses in Guilford County. Probably it is not widespread throughout the state.

Before business and industry can allow workers to enter into paid educational leaves, they must foresee a *direct* relationship between increased productivity as a result of the educational leave and the cost of the loss of productivity occasioned by the absence of the employee. In the interim, we should attempt to enroll employees of existing firms in skills building areas and upgrading training that is cost effective for the employer. Certainly if this approach is successful and works positively, the business

would be much more likely to consider paid educational leaves that would cover the entire cost of the training for the employee.

3. Provide assistance in meeting lifelong education needs of workers, especially when such changes as relocation or retooling of an industry take place.

In North Carolina industries have announced plans in the last three years to invest $6.5 billion in new and expanding industrial plants. This investment means over 100,000 new jobs. The reason that these plants are relocating to North Carolina is that we have many of the needed resources—the land, the work ethic, and the available manpower to be trained. However, a shortage of skilled manpower still exists in North Carolina in several areas.

At his news conference on April 24, 1980, Governor Hunt proposed a comprehensive system-wide strategy for upgrading skill training in North Carolina. It directly involves the community colleges and technical institutes and "will require close coordination with private industry and that is why I am proposing that we offer significantly more 'cooperative apprenticeship' training programs." The cooperative apprenticeship program would offer classroom instruction in the community college or technical institute combined with on-the-job training at an industrial location.

Business and industry will not be excited about contributing to lifelong education needs for workers unless they really need those workers and unless government can be a partner in the process. North Carolina is doing an outstanding job in attempting this partnership. The states that this recommendation mainly speaks to would be the northern states, which are the source of much "sunbelt" migration.

4. Discuss jointly with institutions of higher education the development of financing for lifelong education to result in specific mutually supported proposals.

For this recommendation to bear fruit, support of the concept must be held at the highest executive levels of both the community college or technical institute and the business or industry involved. Gilder, in *Lifelong Education: The Critical Policy Questions*, noted, "The president of the institution and the ranking officer of the corporation must be fully dedicated to the success of a collaborative program or it is doomed to fail. Support staffs must be willing to make the counseling, registration, and teaching changes which are necessary." Mutually supported and mutually advantageous goals and proposals must result from these collaborative efforts. It has been done and it can continue to be done.

All Persons Concerned with Lifelong Education

The American Association of Community and Junior Colleges (AACJC) 1979 Assembly recommended that *all persons concerned with lifelong education:*

1. Support the concept of lifelong education as a means for all citizens to develop competencies which will enable them to live productive and satisfying lives.

We are beginning to look more closely at the capabilities or competencies of people to accomplish a job than whether or not they have a given diploma or certificate. In fact, some people would go so far as to say that all persons should be awarded baccalaureate degrees at birth. Then competencies could be developed without the persons having to be concerned about whether or not they are working toward a baccalaureate or other degrees. Business expects this of people who come to them. If competencies exist for a given training program, then the person who inquires about the capability of a completer can learn exactly what the graduate of that program is able to do and what he is not able to do. This type of evaluation is often more valuable to an employer than whether the person has a particular diploma or certificate. This statement, of course, will not hold up in most instances where the certificate is based upon a level of competency such as a Pittsburgh Certification Test in welding or

an electrician license awarded by the state of North Carolina.

The North Carolina Department of Community Colleges is presently working in many vocational and technical areas, seeking faculty, industrial, and business input to develop catalogs of competencies for programs such as air conditioning, heating, and refrigeration; diesel vehicle maintenance; and in the near future, automotive mechanics.

2. Encourage the federal government and the foundations to support research, development, and dissemination activities which will provide new insights into adult life changes, adult self-awareness patterns, and the demands and rewards for lifelong education.

In support of the statement that we have a long way to go in convincing people of the values and rewards of lifelong education, we should note again the recent Glover Study from the College Board entitled, *Report of the National Forum on Learning in the American Future: Future Needs and Goals for Adult Learning 1980-2000*. This national forum on learning in the American future involved 1,556 policy decision makers, educators, and scholars. They supported lifelong learning as a concept more than almost any topic discussed at the forum. However, when it came to financing and providing financial aid to part-time lifelong learners, these opinion leaders placed a very low priority on the future importance of this topic as well as a very low present priority for its implementation. It is evident that it will take a great deal more hard evidence and research on the demands and rewards of lifelong education, framed in well developed proposals to the federal government and the foundations, before much success can be had in this area.

3. Promote the concept of a continuous study of national needs and issues which may be met through lifelong education with particular attention to the arts and humanities as educational resources.

Funds should be provided from the national level on an annual basis to each of the states so that planning and research on a continuous basis can be conducted in North Carolina and other states to determine the areas which lifelong education needs to address in this state.

In his opening comments to the 1980 AACJC Convention, Edmund Gleazer said that we must stimulate cultural and political activities among our citizens. He urged that we should emphasize improved "training for the vocation of citizenship." He indicated that today we need a more informed and enlightened citizenry, but that this has not been one of our central goals.

With 85 percent of the jobs becoming available during the 1980's requiring an associate degree or less, and with an occupational orientation of paramount concern in North Carolina, we need to do all we can to gather data on our state occupational needs. If a community college does a needs study and finds out that it needs to alter a curriculum or program, how will this be accomplished if the people involved aren't really interested in changing? If we find from an occupational needs analysis that we need 1,000 welders in a given area, do we force people to enroll in a welding program that will meet the community need or do we allow them to enroll in any program they desire? It has long been the case in our country that we do not force people to enroll in a given program. Thus, we allow market conditions to prevail and a shortage will exist for a while before it is overtaken by trained people. Roger Yarrington, in his article, "Good News for Occupational Education," in the March, 1980, *Community and Junior College Journal*, noted that to serve lifelong education, community colleges must "be flexible, adaptive, and responsive to the needs of students in the community." Is your institution ready to do what it takes to "gear up" for the lifelong learner or do you think that your institution is already there? Adult learners look at the community college as only one of the four or five places they visit during the course of a given 24-hour period. We must keep this in mind in our

programming decisions. After people have obtained the skills to get a good job, then they can devote time to studying many of the "finer things in life" such as poetry, philosophy, religion, music, and art, which they did not have time for and often did not have the inclination to study when they were younger. The arts and humanities must be maintained as an option so that the engineer can find out that there is more to life than merely solving a particular engineering problem.

4. Encourage educational agencies to re-examine their mission and service priorities in light of societal changes through comprehensive community needs assessments to better provide for the needs of the older and part-time student.

Yarrington, in his article, "Good News for Occupational Education," states that we must offer "programs to persons at times and places and in ways that facilitate their participation and success." The Shearon study in North Carolina stated that a large proportion of students in North Carolina community colleges and technical institutes were unaware of the support services that were available to them. The availability of support services needs to be improved in each of our institutions. The availability of instructional skills labs, counseling, veterans affairs offices, financial aid, job placement, and student activities for the student engaged in lifelong education is often lacking. Even if the services are available, many students are not aware of them because of the part-time nature of their involvement in the institution as well as the fact that they may go to one campus or center during one quarter and then to another center at a different time of day during the next quarter.

Through a careful examination of mission, as AACJC is currently undergoing, community colleges and other educational agencies will be better able to become more aware of the needs of the older and part-time student.

5. Constantly keep in mind the needs of the educational consumer by regularly consulting the consumer of lifelong educational services prior to the final development of courses, programs, and schedules.

We must develop innovative ways to present the courses, programs, and schedules that we offer to the adult learners in our communities. Informing the public is the key to success. While we are presently dealing with slightly over 14 percent of the adult population of the state at any one time, we should be making a greater impact in our communities because we are within 30 miles of 99 percent of the state's population. What factors mitigate against improving that level of service?

Certainly, we have all learned that if an institution desires to start a weekend college or an audio-tutorial program or courses by newspaper or television, the consumers or users of these types of programs need to be involved in the decision to conduct them. Participation by the consumer is vital if the program is going to succeed, but too often there are times when we have learned this after the failure of our first attempt. Suppose an institution desires to convert from a standard schedule to a four-day-a-week operation, ostensibly for energy conservation? What effect would such a change have on the lifelong learner? What effect would it have on those persons who, even with the schedule availability the way it presently is, are not being reached? Such a schedule may make the staff and faculty happy, but it will also close out three days of the week for the lifelong learner and would certainly not improve utilization of facilities.

North Carolina is doing much to provide opportunities for all its citizens to benefit from lifelong education. We are well on our way. But much remains to be done to improve our programs, and the AACJC recommendations discussed in this paper provide us with many possible plans of action. It seems that our community colleges and technical institutes are indeed well-suited to the development and delivery of lifelong educational services, and we look upon this mission as a definite opportunity and challenge as we enter the decade of the 80's.

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Final Report: North Carolina Assembly on Policies for Lifelong Education

North Carolina is one of the outstanding states in its commitment to educate its citizens for the changing times. Governor James B. Hunt is already on record in strong support of lifelong learning and of education for individual and community development. In his, as in preceding administrations, the state has expressed its commitments directly through the postsecondary institutions, programs, and services. The fight against illiteracy in North Carolina is widely admired in other states.

In January, 1981, a new phase of community and technical college history begins with the creation of a State Board for Community and Technical Colleges. It was in the context of much previous progress, imminent system structural changes, and rapid social and educational change that the members of the North Carolina Assembly came together to discuss policies for lifelong education and to hammer out the following set of specific recommendations.

The Assembly recommends to the legislature and state government:

1. That education must be accessible to learners in order to promote the concept of lifelong learning, and that accessibility is based on the cost to the learner. Programs for lifelong learning should be supported by public tax revenue in order to provide such programs at the lowest cost to the adult learner and therefore ensure continued access to educational opportunities.

2. That funding mechanisms be adjusted to provide equal incentives to institutions to offer extension and curriculum programs based on local community needs. Consideration could be given to differential funding based on program costs.

3. That the state of North Carolina provide funds as necessary to ensure that all citizens of the state have opportunity to acquire basic functional skills.

4. That priorities for lifelong education and funding mechanisms be developed jointly between state and local groups reflecting local history, needs, and circumstances as fully as possible.

5. That community college students enjoy fair and equitable treatment with regard to all programs and services supported by the state, regardless of age.

6. That the community and technical college system be encouraged to provide lifelong education opportunity to local community groups and groups with special needs.

7. That appropriate governmental bodies reaffirm their commitment to lifelong learning in order to meet the future needs of a changing and dynamic North Carolina society.

8. That alternate methods of adult learning be supported and the use of non-traditional delivery systems be facilitated.

9. That all providers be ensured equitable programmatic access to a comprehensive statewide public broadcasting system which could be used by all North Carolina educa-

tional delivery systems. Policy control of such broadcasting should therefore be shared among the public schools, the community and technical colleges, and the universities. Other experimental and pilot efforts with satellite relay, computer delivery, Public Broadcasting System, and mixed media should be supported. Present providers of education opportunities should also pursue effective delivery through available, existing technology.

10. That more effective articulation among education systems be developed, especially noting the unique relationship of community colleges and community schools.

The Assembly recommends to the governor:

1. That the current administration request state budget funds to attack adult illiteracy in North Carolina. The governor should continue his leadership to determine societal priorities and willingness to provide adequate funds to assure that all citizens possess or acquire the basic (reading, writing, computational and other coping) skills needed to function effectively in society. He should also lead the way to determine societal priorities and willingness to provide funds to assure the provision of lifelong educational services for social fulfillment, vocational and avocational opportunity, and rehabilitative needs of the adult populace of our state.

2. That the governor's balanced growth and development program include lifelong education as a vital component of the quality of life of North Carolinians.

3. That appointees to boards, committees, councils, and other groups concerned with education be briefed (and regularly updated) on North Carolina needs for lifelong learning. Also, proponents of lifelong education should take it upon themselves to relay new needs to the governor and to such committee and council members.

The Assembly recommends to the State Board for Community Colleges:

1. That a broad-based "blueribbon" conference be convened to:

a. develop a policy for and working definition of lifelong education for the community college system, covering goals, objectives, scope, and clienteles;
b. develop an articulation and coordination plan with other delivery agencies and systems, utilizing existing mechanisms, such as the Joint Advisory Committee and the Liaison Committee (see #2 below);
c. develop priorities among Lifelong Learning experiences including: basic education, occupational education, quality of life education, sophisticated technological education, and degree education;
d. develop a public information system to generate an understanding of lifelong learning;
e. study the feasibility, suitability, and timing for a proposed Governor's Conference on Lifelong Education in 1981-82, jointly sponsored by the North Carolina Community and Technical College System, the public schools, and the University of North Carolina. The potential conference could also include other North Carolina provider groups and legislative educational committee members.

2. That communications and coordination of efforts among adult education providers build upon the existing Joint Advisory Committee and Liaison Committee. Specifically, these committees should be asked to:

a. compile an inventory of current programs and activities in adult education provided by public and private sectors;
b. identify audiences being served, underserved, or not served by those current educational programs and activities;
c. seek clear definition and delineation of programs and a reasonable division of labor between the various sectors of adult education in meeting lifelong learning needs;

d. develop general objectives to ensure the overall quality of educational programs and services provided for the adult learner.

3. That the new state board should be clearly on record in support of its lifelong education mission. That education for enlightened and responsive citizenry (including skills to lead effective lives) be continued as a mission of the community college system, and that current efforts to increase literacy be improved.

4. That the Board of Community Colleges devise a statement of purpose for its 58 institutions, within the state legal framework, as to the role in providing lifelong education.

5. That the lifelong education mission of the community college system be specifically supported with regard to:

a. internal and external constituencies;
b. expectations of comprehensive programs and services;
c. new learners' needs in the changing culture;
d. special student groups;
e. staff and faculty commitment to the mission of the system.

6. That a policy be established for acquiring funding at variable rates, recognizing that education costs vary by type of program and enrollees. Funds should be provided on a differential scale. A standing task force or other group should be created to report changing needs directly to advisory budget committees, legislative committees, county commissioners, and finance departments.

7. That efforts should be begun immediately to develop alternate or additional accountability methods for determining the perceived success levels of students who are enrolled in non-traditional programs or institutions. Different measures are needed, for example, to reflect the success of the "graduate" as well as the success of the "early leaver" with marketable skills. An exercise for public awareness should be initiated to alert and inform the North Carolina public that accountability is expanding beyond the previously typical collegiate model into new utilization patterns.

8. That equitable representation of the community and technical college system be sought on all local, state, and federal policy committees affecting lifelong education, including federal commissions, the Southern Regional Education Board, and State Agency for Title I, EIC, and future programs.

9. That support funds be sought for development of faculty, administrators, and support staff for effective services to adult lifelong learners. Institutions and systems could act cooperatively in these development efforts, sharing resources and ideas (particularly in utilizing new delivery systems).

10. That funding for institutional and individual support services be provided to credit and non-credit part-time students, on an equitable basis with the traditional full-time students.

11. That a study be replicated in North Carolina similar to the Knowles study in California on measures of student success.

12. That the president of the North Carolina Board of Community Colleges:
a. develop a system of reporting that reflects the broad concept of lifelong learning;
b. initiate policies and procedures which encourage the use of contemporary technology for delivering services and for reporting;
c. make adequate provisions for student and institution support services necessary for lifelong learning.

The Assembly recommends to individual community colleges:

1. That local community and technical colleges serve as the lead action agencies for lifelong education; that education be offered to local residents at such times, places, and locations as are most convenient to the

learners. Broad community involvement should be fostered in both planning and implementation of local and cooperative program offerings.

2. That local needs assessments be conducted to identify and respond to lifelong learning needs.

That additional measures be developed for determining individual student success (other than certification of time expended, persistence to graduation or transfer, or specific class completion). Such measuring devices could include performance demonstrations, personal satisfactions, or other learner self-assessments.

4. That student services be expanded:
a. for part-time and non-credit students;
b. for wider understanding of what services are available;
c. for increased access to federal student-aid;
d. for more off-campus delivery sites.

5. That facility and equipment needs and resources be reviewed and assessed with regard to delivery systems for adult students; possible facilities sharing, or renovation.

6. That campus workshops be offered on effective approaches to adult learners, motivation, and helpful delivery services.

The Assembly recommends to the presidents and trustees associations:

1. That pending legislation to mandate cooperation with public schools be studied for its impacts on the lifelong education delivery plans, goals, and mission of the community and technical college system.

2. That trustees, presidents, and other administrators be brought together in a series of regional meetings to discuss changing student needs and institutional responses. Trustee and administrative development needs to be designed as a continuing process. The assembly recommends that funds for such development be sought, and that effectiveness measures be studied.

3. That personnel policies at individual institutions be reviewed and adjusted where necessary to ensure effective institutional response to lifelong learners. New staffing patterns, leave policies, and exchange agreements may be needed.

4. That local community consumers of lifelong education services be encouraged to voice their expectations of service and support. When appropriating bodies hear a need and response from their constituents, understanding of local mission and programming is increased.

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FLORIDA ASSEMBLY ON
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Recommendations of the 1979 AACJC Assembly on Lifelong Education: Implications for Florida

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Through the daily deluge of news reports and our own personal experiences, we have become painfully aware that our "future shock" has become our "current event." And, as we become more cognizant that many of our communities are coming apart at the seams, people are disenchanted with leadership, inflation is rampant, shortages threaten—the statistics and projections are staggering—we realize that old answers do not fit new questions. We do not have the competencies to meet the challenges.

Problems of individuals reveal the dearth of competencies they possess to cope with getting old or being handicapped; being unemployed, possessing few job skills, or changing careers; being unable to read or write or even speak the native language of a new homeland; being alienated, abused, incarcerated, or generally discriminated against; or simply being unable to "make it" in a changing world.

On a positive note, efforts abound to address these problems. We recognize that what we need is a "learning society." But, much of our policy formulation has floundered, our cooperative thrusts have revealed competitive interests, and efforts at addressing needs have made us aware of limited available resources. Yet, America's community colleges represent a network and resource that can provide a mechanism for Americans to get involved in analyzing lifelong education needs, developing policies to facilitate meeting those needs, and increasing cooperation among community groups. The American Association of Community and Junior Colleges (AACJC) is already providing leadership in this regard.

With the aid of a grant from the W.K. Kellogg Foundation, AACJC "has undertaken the responsibility to advance lifelong learning through development of more favorable policy frameworks." This Policies for Lifelong Education project has already resulted in a national assembly on the subject. Four state-level assemblies are now under way. The first was held in North Carolina in May, 1980. This Florida Assembly is the second.

A major purpose of this meeting is to analyze the policy recommendations developed in January, 1979, at the National Assembly on Policies for Lifelong Education, to relate them specifically to Florida, and then to formulate recommendations that more specifically address Florida's needs for lifelong education.

This discussion paper is modeled after a similar presentation by H. James Owen prepared for the North Carolina Assembly. The format provides a summarized statement of each recommendation of the National As-

Benjamin R. Wygal, president of Florida Junior College at Jacksonville, discusses the implications for Florida of the recommendations of the 1979 Assembly on Lifelong Education conducted by the American Association of Community and Junior Colleges. Dr. Wygal was a participant.

sembly, followed by comments. In some cases, I have consolidated recommendations, hoping to facilitate organization of discussion.

First, let us take a brief look at Florida and its community colleges.

Florida is one of America's fastest growing states. In 1980, the population is estimated to be over nine million and in 1990 it is expected to reach at least 10.7 million. Today, over seven million people are potential clients for lifelong education—that is, they have reached their sixteenth birthday (beyond compulsory school attendance) or are older. These conservative estimates and projections do not include the potential impact of refugees.

The rate of growth in some areas of Florida is such that it produces problems in communities and institutions that are overwhelming and potentially can render them unable to perform adequately. There is a great need for frequent updating of demographic data.

People retire to Florida. Great numbers of older people continue to migrate to the state. And while the need to educate for creative use and adaptation of these retirement years is important, these individuals traditionally may not view education as a lifelong process. The old and the young appear to be on a collision course as they compete for diminishing resources.

Just over one-half of the adult population has completed high school. There is a large and growing non-English speaking minority whose culture and language make its educational needs unique. Florida has one of the largest prison populations in the country. Florida is inadequately served by public transportation, and the cost of gasoline has become prohibitive for many.

There has been much interest in postsecondary education in Florida. The 1980 legislature passed a sweeping higher education bill that was vetoed by the governor because of confusions and uncertainties in the bill. Just this past year the Joint Executive and Legislative Commission for the Study of Postsecondary Education completed its work. There have been many studies over the years. It was one of them that resulted in the establishment of an outstanding community college system.

In 1957, Florida initiated a long-range plan to develop and implement a statewide system of community colleges. By 1972, the 28th college district had been established—Florida had substantively reached its goal of providing post-high school education opportunities within commuting range of 99 percent of its population.

The national recognition that Florida has received for its community college system is well deserved. There is local authority vested in district boards of trustees that provides for a community-based concern for educational needs at a policy-making level. Essential statewide coordination is provided by State Board of Education Rules and the recently established State Community College Coordinating Board. The annual unduplicated headcount enrollment for the 28 colleges is now over 700,000. About one half of these students are enrolled in the broad area of adult continuing education, which includes community services.

The first statement of purpose for community colleges included the three major areas of adult continuing education, including community services, occupational education, and general and academic (or university parallel) education. Those three major categories still provide the framework for a plethora of lifelong learning activities still developing in the 28 college districts. Even as campus facilities are still expanding, instruction has been taken off campus to some 2,000 other locations—churches, public schools, community centers, and industries—in order to provide better services.

Nine community colleges have responsibility for adult basic education and are authorized to offer high school courses and award high school diplomas. In each of the 28 community college districts there is a coordinating council for vocational and adult education and community instructional services. Community instructional services (CIS) funds are allocated by the coordinating councils after significant community problems have been identified and prioritized.

Unfortunately, funding of community college programs has not kept pace with inflation. When comparing purchasing power adjusted for inflation, the colleges receive fewer dollars per student than ten years ago.

AACJC Recommendations to Community Colleges

The American Association of Community and Junior Colleges at its 1979 Assembly recommended that *community colleges:*

1. Adopt policies and practices that foster lifelong education.

Most, if not all of Florida's community colleges appear to be committed (at least on paper) to the philosophy of lifelong education as evidenced by such statements as:

> The College strives to promote an environment conducive to lifelong learning, one in which individuals can attain knowledge and develop skills and attitudes to meet the ever-changing needs of daily living (Florida Junior College at Jacksonville).
>
> . . . Lifelong learning opportunities for those who seek personal development through educational offerings and activities (St. Petersburg Junior College).

Have policies and practices really changed to fulfill this philosophy?

Tremendous strides have been made in providing access to non-college credit classes by taking classes to the people. But support services have not been made as accessible. College credit, by planned program, is not as accessible. We cannot say that the quality of instruction is equal or even adequate in every geographic location.

Most policies and procedures are designed for the degree-seeking student and are frequently frustrating and irrelevant to the lifelong learner. Some of us test all first-time students, we collect considerable demographic data, some collect information for clubs and organizations, some have application deadlines and expect students to register well before classes begin, and we are all funded by FTE formulas and are assumed to be on specific semester or quarter calendars (*Report of the 1979 Assembly on Policies for Lifelong Education*, p. 107).

Many of these policies and procedures persist even though we know better: our student goals inventory studies have shown that many of our students have different goals for themselves than we traditionally ascribe to them; and we know that our students are older (average age almost 30 now), there are more part-time than full-time, women outnumber men, and the community college is *not* the most important thing in their lives.

How do we update our policies and procedures so they really will foster lifelong education? How will we continue to update them as our clientele continue to change in composition? Who should be involved in the updating and at which levels? The development of processes to accomplish this update is obviously of great importance.

Florida's community colleges need helpful recommendations regarding which kinds of policies and procedures need updating and how to go about putting the effort into motion.

2. Join hands with other groups to meet community needs identified through local needs assessments.

The "non-traditional" student has become the norm:

> . . . those who cannot afford the time or cost of conventional further education; those whose interests and talents are not served by traditional education; those who have been displaced by automation and who must retool themselves in mid-career; those whose previous educational experiences have precluded their acquiring the necessary skills to move into the higher echelons of learning; those whose educational progress has been interrupted by illness, military service, or other temporary conditions beyond their control; those who are elderly and have come passively to accept the questionable blessings

> of retirement; and the multitudes caught up in the lockstep of tradition, believing mistakenly that college is four walls, semester-length courses, earning a degree, only for the culturally and intellectually elite, and, most significant of all, beyond their reach. (*College Leadership for Community Renewal*, pp. 20-21.)

Where to find these "non-traditional" students and all the other so-called "target populations" is the opening question of needs assessment. The remainder of the agenda deals with their educational needs. But no single model exists for a comprehensive needs assessment. An eclectic approach is required. And here is where cooperation comes in.

A survey in Jacksonville revealed that over 200 agencies and organizations—other than churches—offered some kinds of educational or social services. Most such organizations see needs assessment as important if quite elusive and include in their activities surveys and other efforts in this regard. And there is great overlapping of efforts. Can Florida's community colleges become catalyzing agents to consolidate and direct these diverse and duplicative analyses?

Moreover, since these other organizations are also delivering services, can Florida's community colleges provide leadership in developing a coordinated design for solving social problems? For example, can the community instructional services program be better used to effect cooperation? Various examples of cooperation do exist and should be shared.

Cooperation with community organizations requires some concessions on the part of the community college: Is it willing to share in the planning of projects? Is it willing to share both the leadership function and the decision-making function? Is it willing to share responsibility? And is it willing to share the credit for successes? (*College Leadership for Community Renewal*, p. 59.)

3. Translate local needs into priority statements and present these to local, state and national funding agencies.

This is, obviously, the next step. However, the best intentioned cooperative efforts can break down when responsibilities for implementation begin to be divided. Can the community colleges effectively provide leadership in promoting more jointly sponsored programs—even mergers of programs and organizations—and learn to give as well as receive?

Community instructional services (CIS) funds in Florida are administered by the state commissioner of education. The local coordinating councils for vocational and adult education are required to approve identified and prioritized lists of significant community problems as well as the activities designed to address those problems. There is required coordination among community college districts and public school districts. There is indication that this coordination is not effective in some districts. What can be done to improve cooperation in this regard?

Funding agencies, including the Florida legislature, are looking with favor on cooperative activities and giving priority to funding such efforts. The Southeast Florida Educational Consortium is looked upon with favor by the legislature. Capital outlay projects, which include community involvement and support, are also receiving special attention. More unity of effort needs to be shown to all kinds of public and private funding sources at local, state, and national levels. How can Florida's community colleges better meet this challenge?

4. Conduct community forums on lifelong education and publicize recommendations.

A number of Florida's community colleges have conducted forums and charettes on topics such as "Energy and the Way We Live," and in developing their own mission statements. AACJC is actively promoting the idea that every community college in the nation conduct a community forum in the fall of 1980 on the topic of "Education for Community Development." Topics for discussion have been suggested:

- What is meant by education for community development?

- What is the nature and purpose of community education?
- Who provides community education?
- Whom does community education serve?
- Who needs community education?
- Who will pay for and control community education?

(*Community and Junior College Journal*, March 1980)

Who should take the lead in urging all 28 community colleges to conduct such forums? Can these forums be designed to really obtain input on defining and meeting needs of lifelong education?

AACJC President Edmund J. Gleazer, Jr., stated in the March 1980 issue of the *Journal:*

> . . . the college needs to work with other educational institutions and agencies in its community to enlist a broadly representative planning committee, to identify the facets of these topics that are of most concern to its community, to commission the collection of additional background materials needed for informed discussion in its community, to plan how to involve as many citizens as possible in the discussions.

Will present financial and human resources permit this kind of planning?

Finally, how can the unserved and even uninterested portions of the population be involved?

5. Collaborate with other community agencies to define clientele to be served and shape programs that best meet consumer needs.

Obviously, cooperation and collaboration are essential to a successful approach to programming for lifelong education. Can we gain insight from these other agencies to help us understand better that where the *content* of competency development has failed us that the *process* by which individuals become lifelong learners (when they continue to develop knowledge, skill and attitudinal competencies) might succeed?

As pointed out earlier, many policies and practices that are designed for the degree-seeking student (and to fit traditional mind-sets) should be revised in order to remove barriers to access. But, we should consider also that

> . . . the ultimate barrier for adults who want to learn is a conceptual one. Most educators tend to mean schooling when they speak of education, and education when they speak of learning. Conversely, most adults seem to actually want the experience of learning when they approach education, and they often discover that access to education means schooling. (*The Adult Learner: Needs and Opportunity*, p. 9.)

There is a population out there that does not recognize the need for education. How can we cooperatively effect communication with these citizens that will result in changed attitudes and interests? It is necessary to involve them in the process.

6. Seek outside funding for professional development to prepare staff and counselors to better meet adult needs.

This is a worthy challenge for Florida's community colleges, *but* should we not first examine our priorities and spending patterns under the present staff and program development program? Two percent of last year's state funding for community colleges is set aside for staff and program development.

7. Make faculty better aware of their role in lifelong education and their impact on the adult learner.

This is a continuing staff development challenge. It is estimated that at least 90 percent of all full-time community college faculty in Florida are on a continuing contract. Few new positions are available and more faculty are spending entire careers in one institution. The characteristics of the learner with whom they are dealing have changed and will continue to change. The way faculty respond will determine the extent to which many lifelong learners will be able to benefit from the

system. How can the colleges motivate faculty to become more attuned to lifelong education, especially when dealing with a collegial setting, academic freedom, and "non-compulsory" staff development?

8. Take the initiative through the office of the president in seeking outside funds and join with other agencies to establish a community educational information center.

A great amount of frustration can be experienced when a person looks for help and then is "bounced" around from one agency and then to another. After a stop or two the person may just quit trying. The concept of a community educational information center that provides information, counseling, referral services, as well as "brokering" services, is a sound one. The "One-Stop" center in Jacksonville was designed and initiated to do just this. But coordination, turfism, and financing prevented the continuation of the experiment. What are the processes that a community college president in Florida might follow in initiating such a project? What are the sources of funding that might provide the start-up financing (the "carrot") for the endeavor? How can one be sure that the enterprise will result in individualized service to the client and not merely serve the special interests of the agencies?

9. Take the lead through the trustees in developing and interpreting policies to facilitate lifelong learning services.

Florida's community college trustees are the first-line contact between the community and the colleges. It is their responsibility to constantly test the mission of their local community college—to keep it simultaneously before the faculty and staff and the community at large. They must insist that the mission or purpose statement be regularly studied and updated. And when they vote on the curriculum and the budget, they give tangible support to the purpose of the institution.

Who will remind the trustees of their duty, especially with regard to lifelong education? The State Community College Coordinating Board is certainly a key leader. The Trustees Commission of the Florida Association of Community Colleges is a viable avenue for professional development.

Recommendations to the American Association of Community and Junior Colleges

The American Association of Community and Junior Colleges (AACJC) 1979 Assembly recommended that *AACJC:*

1. Request the President of the United States to include the concept of a learning society in United States positions on domestic and international human rights, and

2. Request that he convene a White House Conference on Lifelong Learning.

This Florida Assembly could play a very supportive role on these two recommendations by urging the governor and the cabinet to adopt and send to the President a strong statement supporting lifelong education, especially with regard to the accomplishments and potential of Florida's community colleges, and challenging the chief executive to include the concept of a learning society as part of the U.S. position in domestic as well as international rights. Further, it should request a White House conference on lifelong education.

How can such action be best coordinated with AACJC and other states' initiatives? How can we be sure that community colleges play a central role in activities such as a White House conference (sometimes we end up being left out)?

3. Approach outside funding sources such as the National Institute of Education (NIE) to support development of additional national clearinghouse services on lifelong education topics.

This Florida Assembly should consider ways in which it could assist AACJC in supporting the development of a national clearinghouse. An adequate data base on lifelong education

topics would reveal the breadth and depth of activity by community colleges and further suggest the potential of our institutions. For example, the National Center for Education Statistics shows that from 1969 to 1975 the proportion of adults taking courses at community colleges increased considerably, while it decreased in universities and other four-year institutions.

In the May 31, 1980, issue of *CETAC Briefs*, the acting director of the National Institute of Education, Mike Timpane, said that he foresees that the new office of educational research and improvement, which includes NIE, would promote the development of "models for systematic and effective coordination for research and development efforts. With the NIE and the Fund for the Improvement of Postsecondary Education both in the same constellation, we can obviously look for more comprehensive coordination of issues." This should give us a clue as to the potential in this area.

4. Request AACJC to sponsor a "National Issues Forum" as a model for a series of community forums on lifelong education involving a diverse number of community groups.

Among the responses by AACJC to this recommendation have been the further development of community forum topics, mechanisms, models, and other suggestions; significant discussions at the annual convention; continued emphasis on the Policies for Lifelong Education office of AACJC; publication of articles and reports; this Florida Assembly; and a course by newspaper designed to coincide with the fall community forums. Can this Florida Assembly assist AACJC in requesting the President to become involved in announcing the fall community forums?

5. Continue to work with the national Chamber of Commerce and other groups to develop improved linkages between business and community colleges to advance lifelong education.

One of the continuing objectives adopted by the AACJC Board of Directors in 1980 is: To provide vigorous leadership in education for employment and economic development.

It appears to be more important than ever to maintain and strengthen linkages with business and industry during those times of fiscal restrictions. State legislators are asking questions such as "how many times should we train a given individual?" The national Chamber of Commerce and other business and industry organizations can certainly help further lifelong education as a means of developing investment in human capital in the U.S.

What recommendations can this Florida Assembly make to AACJC to help improve linkages with business and industry?

6. Provide leadership in starting a coalition of national groups concerned with furthering lifelong education and examining the prime forces impinging on lifelong education.

The reason AACJC decided years ago to settle at One Dupont Circle in Washington, D.C.—the home of many national educationally oriented groups—was to be able to associate with other such national groups. Now that community colleges have emerged as such a significant part of higher education, AACJC can provide better leadership with other associations. But the circle of influence must continue to be expanded to all kinds of national groups and interests playing some sort of role in lifelong education. AACJC can become a catalyst for action at the national level just as the local community college can at the local level.

Can this Florida Assembly assist AACJC by helping identify Floridians who are active in those other national groups and who may be able to assist in developing such a coalition?

7. Promote and foster among its member institutions cooperative community-based approaches in the delivery and development of lifelong education services, and

8. Communicate directly with the learners and obtain their input as policies on lifelong education are developed, and

9. Work with the national organizations of governors, mayors, and state legislators to seek implementation of policies more favorable to lifelong education.

The *Purposes* stated in the AACJC Constitution are:

> The Association shall promote the sound growth of community and junior colleges and shall create in them an atmosphere conducive to learning. It shall contribute in every practical way to the development of a better human environment in America by working for the extension of full educational opportunity to all Americans on an equitable basis, qualitatively and quantitatively, and by striving for the elimination of all forms of discrimination whether by race, creed, sex, or financial condition.

To carry out these purposes, the AACJC Board of Directors has adopted the following as a statement of mission:

> The mission of the American Association of Community and Junior Colleges is to organize national leadership and services for individual and community development through lifelong education.

Obviously, these activities fall within the objectives of AACJC. Again, how can this Florida Assembly assist AACJC in the recommendations?

Recommendation 8 speaks to communicating openly and directly with learners and obtaining information from them. Is this appropriate? Will AACJC have to solicit help from local community colleges in order to make these contacts?

State and Federal Governments

The 1979 Assembly of the American Association of Community and Junior Colleges (AACJC) recommended that *state and federal governments:*

1. Strongly urge Congress to support the Higher Education Act's goal of providing appropriate opportunities for lifelong learning for all citizens without regard to previous training, sex, age, handicap, ethnic background or economic circumstances, and

2. Review the Higher Education Act as amended in 1976 by Congress and revise the current law into a more effective lifelong education act, and

3. Enact an "Urban Extension Act" to provide funding incentives for the development of urban extension programs similar to the cooperative extension programs in rural areas, and

9. Allocate federal funds to the states to conduct an on-going educational needs assessment, as well as a system of educational brokering using the agricultural extension service as a model where appropriate, and

14. Revise the federal income tax laws to provide federal income tax deductions for education expenditures for credit, noncredit, vocational, and avocational programs.

At the time of this writing, the Higher Education Act is still in conference as is the Urban Extension Act. The role of the community colleges as provided for in these acts needs to be considered with a view toward protecting and expanding their position. Flexibility is needed to open more avenues of service to lifelong learners.

Future legislation and appropriations at the federal level need to be developed to assist in needs assessment, cooperation, and educational brokering. Also, various lifelong education incentives need to be provided by adjusting existing policy on income tax deduction.

But the real issue for this Florida Assembly with regard to federal legislation is how we may more effectively influence it.

Presidents of community colleges occasionally receive newsletters from national organizations urging them to write their congressmen. I doubt that many letters go out. AACJC and the Association of Community

College Trustees (ACCT) hold federal affairs workshops that are effective for those who attend. But more follow-through and mobilization at the grass roots is needed.

What can this Florida Assembly recommend that community colleges and local and state agencies and organizations do in order to be more productive in influencing federal legislation? Should local boards of trustees periodically discuss in regular meetings legislative issues, take positions, and effectively communicate those positions to their representatives in Washington? Does the Florida Association of Community Colleges (FACC) have a role to play at the federal level? Should the State Community College Coordinating Board (SCCCB) develop a priority for federal legislative activity? Can some sort of federal clearinghouse or coordinating mechanism be developed in Florida? There is great potential for improvement in this area.

4. Establish and support interstate cooperative projects on lifelong education through state boards and coordinating agencies.

The Southern Regional Education Board (SREB) has great potential for providing support and cooperation through boards and coordinating agencies operating at the state level. Recommendations could possibly flow from the State Community College Coordinating Board to the State Board of Education, and the governor urged to contact his fellow governors in the south in order to make a recommendation to SREB that it provide leadership. It should be noted that all of the governors of the southern states are members of SREB.

A question that comes before this Florida Assembly is: Does the "1202" commission play a role here?

Who should devise the content of such projects and how should the input and development process work?

5. Develop funding models at the state level to facilitate lifelong education in both the public and private sectors, and

8. Revise state aid formulas, student financial aid formulas and tuition charges to accommodate lifelong education such that there are provisions for activities like state aid to part-time students and revised standards for determining aid to independent students, and

18. Change the current patterns of funding used at the state level that are based upon the generation of full-time equivalent (FTE) students.

Here is the hard question: How do we convince our state legislators of the importance of the concept of lifelong education and how do we get their commitment to assure realistic lifelong educational opportunity? A possible response here would be to demonstrate to the legislature the economic benefits of lifelong education so that funding decisions might follow.

In Florida, the funding is FTE oriented, that is, semester hours and clock hours simply based on the traditional concepts of "schooling." What would a non-FTE driven formula look like? What would be some of the suggested output measures?

In dealing with the legislature, it should be noted that the community colleges have been the "good guys" of higher education; that is, we have not caused many problems, everyone loves us, and we have not caused a serious crisis. It is a mixed blessing. We don't get that much attention—or funding—from the state. We have fallen behind the universities and the K-12 program in keeping up with real dollars per student over the last 10 years. Then what recommendations does this Florida Assembly have to help us convince legislators of the importance of lifelong education? How can we involve the grass roots and how can we show a coordinated effort? What recommendations would this assembly make to the Community College Presidents' Council, the FACC, and the SCCCB to help them better approach the governor and the legislative leadership?

6. Develop communication networks and coordinated planning between public and private agencies with state agencies responsible for lifelong education taking the lead.

10. Establish a task force on lifelong education within each state to ensure continual dialogue, improve the delivery system, conduct local community forums, and establish community task forces on lifelong education.

Elizabeth Cobb, president of the Florida Adult Education Association, laments that in Florida "there exists no entity to act as a strong enough voice for Adult and Community Educational Services." She goes on to recommend that the desired state of affairs in Florida would be "increased interaction among members of the adult education community, legislators, government heads, business and industry leaders, in order to foster new linkages among organizations, to maximize resources, and to enrich the common understanding of the learning needs of adults."

Again, the key question is: Who will provide the leadership? Which organizations should this Florida Assembly challenge to see that a task force is established and that networks of communication and coordinated planning are set up?

7. Direct each state under the aegis of the Education Commission of the States (ECS) to develop a positive forward-looking master plan that takes into account lifelong education needs.

Some 20 years ago, planning took place to meet the "tidal wave of enrollment." Considerable change has taken place in the community college student body since that time. For example, the Policies for Lifelong Education brochure published by AACJC states that:

> . . . the number of adults in basic and secondary education more than doubled between 1972 and 1976, with over 50% of the participants in 1976 black, Asian, or Hispanic. That these students are potentially community college students is illustrated by the fact that the number of people over age 36 enrolled in two-year colleges increased by at least one-third over a two-year period. Ninety-three percent of the increase in enrollment over the fall of 1974 was attributed to growth in the enrollment of women. Over one-third of the first-time freshmen in two-year colleges are from families with incomes of less than $13,000. Students in community colleges are older, married, attending part-time, and from less affluent homes than those in other segments of higher education.

The recommended master planning should also address the issue of recurring education, that is, how many times shall we "educate" an individual. This Florida Assembly should strongly recommend to the appropriate agency that such master planning take place.

It should be noted that the State Department of Education took the initiative in planning for lifelong learning in Florida as early as February, 1977. A national invitational conference was held in Orlando, Florida, in 1977 in order to give definition and direction to Florida educators in setting policy based on the federal law as defined in the 1976 Education Amendments of the Higher Education Act (especially part B—Lifelong Learning). Educators nationwide met in Orlando to discuss lifelong learning and improving access to education for all citizens. Many of the recommendations from this conference have been implemented.

11. Orient presently funded manpower programs, such as CETA, as much as possible along the lines of lifelong education.

This Florida Assembly should recommend that community colleges get actively involved with the CETA local prime sponsors. They should initiate action to get representation on the manpower advisory councils and should be urged to study carefully all of the provisions of CETA in order that they might best understand how to orient programs along the lines of lifelong education.

12. Develop policy guidelines at the federal level for the improvement of information sharing, communications, consultation and planning for federally supported lifelong educational efforts, and

13. Allocate funds through the National Institute of Education (NIE) to fund further research on lifelong education efforts to include cost-benefit studies, and

17. Strongly support the position that a well-funded lifelong education program is essential to the achievement of our national goals of lowering the rate of inflation, increasing productivity of workers, and decreasing unemployment.

Valid cost-benefit studies might just represent the very best persuasive evidence for federal agencies to give greater support to the concept of lifelong education as a critical response to our national goals of strengthening the country economically.

This Florida Assembly should recommend a plan of action for community colleges and state agencies to work with AACJC in achieving these recommendations. Once again, how can Florida develop more influence on the Washington scene?

15. Revise legal and procedural restrictions regarding lifelong education at both the state and federal levels by eliminating prohibitions against unemployment insurance beneficiaries enrolling in educational programs and restrictive welfare policies that impede participation in lifelong education.

Carefully revised policies and procedures could contribute greatly to breaking the unemployment, underemployment, welfare merry-go-round. Current restrictions that impede participation in lifelong education reduce the potential of helping people become economically productive. This nonproductivity creates criticism and disenchantment on the part of the public at large with the entire welfare program.

Once again, the Florida Assembly needs to suggest, to the appropriate agency, that strong recommendations for change be made. Are Florida's community colleges ready to meet the needs of greater numbers of learners that might be generated by removal of these restrictions?

16. Encourage accrediting and licensing bodies to take into account lifelong education policies in their review processes.

The Commission on Colleges of the Southern Association of Colleges and Schools, the regional voluntary accrediting association, is currently in the process of revising its standards for accreditation. It appears that there is receptivity on the part of the Commission to make the standards consistent with the concept of lifelong education. In fact, for the past few years, it has demonstrated its awareness by giving greater attention and consideration to Standard IX on Special Activities.

In its process of revising the standards, the Commission on Colleges is currently establishing work committees. The timing is right for this Florida Assembly. It should make recommendations as to who should contact the Commission to keep abreast of developments and grasp opportunities for input. Obviously, Floridians will be serving on these committees, and appropriate contacts should be made with them.

Labor, Business, and Industry

The American Association of Community and Junior Colleges (AACJC) 1979 Assembly recommended that *labor, business, and industry:*

1. Recognize that educational development can profit from funds derived from business and industrial capitalization as well as from federal, state, local, and foundation sources.

The new and expanded markets for technology in the instructional, counseling, and referral fields are producing more business, which in turn provides more industrial capitalization that can be used in the educational development field. The time is ripe to convince those industries that the concept of lifelong education should be integrated into future development. These enterpris

should team up with the best thinkers in the lifelong learning arena.

The conferees in the Florida Assembly should be aware of the enormous amount of state funds that go to purchase commercially produced educational technology. How can community colleges best communicate the need for those industries that produce this material and equipment to begin development along lifelong education lines?

2. Provide periodic paid educational leaves to allow workers to participate in lifelong educational experiences throughout their work lives.

While many enterprises provide opportunities for professional and skills upgrading through tuition reimbursement, attendance at conferences, etc. (business and industry themselves are very big in the education field), apparently little is being done to provide time off for employees to develop non-work lifelong education competencies. The need is great for all workers going through life transitions requiring educational support.

This Florida Assembly should recommend that AACJC compile a catalog of model programs for lifelong education leaves for workers. Similar information should be gathered specifically for Florida. Once model programs and other information are secured, how can these best be presented to businesses, industries, their state associations, and labor unions?

3. Provide assistance in meeting lifelong education needs of workers, especially when such changes as relocation or retooling of an industry take place.

In planning to meet the lifelong education needs of workers, we must take into account growth and greater potential in alternative work styles such as: job-sharing, job restructuring, job enrichment, and professional part-time work. Business and industry should be sensitized to providing greater flexibility and greater opportunity for lifelong education.

Florida's industry services program can come into play in providing help to industries in work force development when relocating and retooling. Should the industry services' guidelines include recommendations for other than skill-development education?

This Florida Assembly should recommend information gathering on model practices and develop a plan for presenting this information to business and industry in Florida.

4. Discuss jointly with institutions of higher education the development of financing for lifelong education to result in specific mutually supported proposals.

The industry services program represents a joint education/industry approach to job-skills development. Might this program be expanded to include other than job-skill development?

This Assembly should recommend to local community colleges that they initiate discussions with local business and industry. Many excellent examples of cooperation can be found in all of Florida's community colleges, but most are job-skill oriented. Business and industry should recognize that competencies which employees need in order to live more productive lives include more than just job competencies; but, for example, they include competencies in citizenship, the use of community resources, leisure time, family relations, and self-advocacy.

Cooperation with business and industry requires the personal attention of the college president and trustees.

Recommendations to All Persons Concerned with Lifelong Education

The American Association of Community and Junior Colleges (AACJC) 1979 Assembly recommended that *all persons concerned with lifelong education:*

1. Support the concept of lifelong education as a means for all citizens to develop competencies which will enable them to live productive and satisfying lives.

Perhaps the most important outcome of this Florida Assembly will be the renewed commitment on the part of the attendees to the concept of developing a "learning society." Such commitment can provide the follow-through impetus for urging Florida's community colleges, AACJC, state and federal lawmakers and agencies, and business and industry to join in building a better environment for lifelong education.

It is hoped that each of us attending the Assembly is continuing to strive to meet new objectives and not passively accept our present level of achievement. As we spend a lifetime continually developing competencies to meet the demands of our changing world, perhaps our enthusiasm will be infectious.

2. Encourage the federal government and the foundations to support research, development, and dissemination activities which will provide new insights into adult life changes, adult self-awareness patterns, and the demands and rewards for lifelong education.

An analysis of statements about lifelong education in the Higher Education Act, Title I-B, Section 131, made by the Education Division of HEW included the following:

> The American people need *lifelong learning* . . .
>
> The American people need *lifelong learning* to enable them to adjust to social, technological, political, and economic changes.
>
> *Lifelong learning* has a role in developing the potential of all persons including improvement of their well-being, upgrading their workplace skills, and preparing them to participate in the civic, cultural, and political life of the nation.
>
> *Lifelong learning is important* in meeting the needs of the growing numbers of older and retired persons.
>
> Learning takes place through formal and informal instruction, through educational programs conducted by public and private and other institutions and organizations, through independent study, and through the efforts of business, industry, and labor.
>
> Planning is necessary at the national, state, and local levels to assure *effective use of existing resources* in the light of changing characteristics and learning needs of the population.
>
> More effective use should be made of the *resources* of the nation's educational institutions in order to *assist the people* of the United States in the solution of community problems in areas such as housing, poverty, government, recreation, employment, youth opportunities, transportation, health, and land use.
>
> American society should have as a goal the availability of appropriate *opportunities for lifelong learning* for all of its citizens without regard to restrictions of previous education or training, sex, age, handicapping condition, social or ethnic background, or economic circumstance.

The general framework is there. Recommendations that should be addressed by this Florida Assembly are included under the section of Recommendations to the Federal and State Governments. (Incidentally, Florida does represent some unique research opportunities because of its older population.)

3. Promote the concept of a continuous study of national needs and issues that may be met through lifelong education with particular attention to the arts and humanities as educational resources.

Again, this issue was addressed under the section on recommendations to State and Federal Governments.

Giving attention to the great resources of the arts and humanities underscores the need to always include other than job-skill competencies in lifelong education planning. This Assembly should recognize the wealth of resources Florida has in the arts and humanities and make recommendations on processes to identify and include them in planning.

4. Encourage educational agencies to re-examine their mission and service priorities in light of societal changes through comprehensive community needs assessments to better provide for the needs of the older and part-time student.

Mission re-examination is crucial to making any educational agency or organization viable. We must constantly test the appropriateness of activities against our mission. As we develop better skills and processes in needs assessment, we will be better able to address the needs of older students and their unique problems.

People are in better health today and are more likely to reach their 80's and 90's than were their forebears. By the year 2000, it is predicted that nearly 12 percent of the U.S. population will be 65 years of age and older. Undoubtedly, a higher percentage of older people will live in Florida. One of the greatest problems the elderly have is found in the attitudes of younger people toward them. We in Florida's community colleges are dealing more effectively with part-time students because they outnumber full-time students, even in college credit classes. Colleges here have a head start on meeting the needs of older people.

Although a needs assessment has been covered in an earlier section of this paper, this Florida Assembly will want to recommend again that educational agencies do a better job in this regard.

5. Constantly keep in mind the needs of the educational consumer by regularly consulting the consumer of lifelong educational services prior to the final development of courses, programs, and other activities.

Many of Florida's community colleges do outstanding work with advisory committees. But they should take a step closer to the consumer. The recommended community forums for this fall should be a good start. Not only must there be follow-through, but direct input from the consumer of lifelong educational services must become a regular part of needs assessment and program planning.

While this discussion paper raises many questions and recommendations, it must be said that Florida's community colleges are providing leadership in the lifelong learning arena and should remain in key and central leadership roles in future development. I hope the attendees at this Florida Assembly will agree.

The Financial Implications in Policy Development for Lifelong Education in Florida

Lee Pryor Young

The American college student is no longer only an 18-21-year-old post-adolescent. The population is becoming older each year, and the majority of the people are beyond the age of 21. The response of higher education to the new majority has been that of forcing or requiring citizens to go through the existing system, designed for the younger traditional population, rather than developing new systems based on individual needs. Since the new majority—the older students—are significantly different, they require college programming that is entirely different from what we have known in the past. Education has to be linked to development and learning needs that go on through the life span of individuals.

There are four points that should guide two-year colleges in responding to the new majority:

1. Lifelong education must be more student-centered rather than institution-centered;

2. The majority age group should have access to learning for greater periods of time than is required for the traditional group, often throughout their lives;

3. The institution should incorporate the experience of the majority in developing academic policies;

4. Lifelong learning cannot rely solely on the traditional methods of learning and its learning support systems.

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National Statistics

The most recent fact sheet on two-year colleges, collected in October, 1979, by the American Association of Community and Junior Colleges, reflected that there are currently 1,230 two-year institutions in the United States and outlying areas. Among these are public and independent community and junior colleges, separate campuses of individual colleges and universities located in all areas of every state in the United States, as well as in Puerto Rico, Panama, American Samoa, Canada, and in various other foreign countries. There are an estimated 64 million participants in various kinds of postsecondary education. Of the 64 million learners, 83 percent named some transition or specific event in their lives that caused them to start learning. Of the 83 percent, 56 percent cited job/career transitions and 35 percent cited family life transitions as triggering their learning activities.

In 1979, about 85 percent of all two-year colleges reported enrollments in continuing education. The two-year college is one of the biggest suppliers of education for adults. Seventy-six percent of community, junior, and technical colleges reported that no fees were charged for the elderly learner. Almost half of the two-year colleges have some type of unit of measurement (Continuing Education Unit—"CEU") for funding an organized adult and continuing education program. As the occupational structure of the country continues to change because of job retraining needs, technological innovation, expanded social services, entry and reentry of women into education and work,

longer life spans of people, and growth of leisure time, most providers of occupational training seem likely to prosper. According to the 1980 *AACJC Directory*, the non-credit enrollment in two-year colleges increased 11.1 percent between 1978 and 1979.

In order to provide the educational needs of the age majority (beyond 21 years of age), the real question is not *if* the two-year colleges should provide such continuing education programs, but *how much* financial support can and will governmental agencies (federal, state, and local) give in order to expand and change the educational concept to meet the needs of such age groups.

Florida Community College System

The Florida Community College system has for many years demonstrated some commitment to lifelong education. Since the State Board of education adopted the Community Council's plan in 1957 to put post-high school educational opportunities within commuting distance of 99 percent of the state's population, the funding for such programs has been improved by expanding the educational offerings. Now all citizens may have the opportunity to acquire knowledge and skills throughout their lifetimes, in order to maintain or improve their occupational skills and academic or personal development.

The Florida system has also received national recognition because of its unusual balance of local control with state coordination and support. Florida's community colleges are locally controlled institutions operating within a broad framework of the State Board of Education rules which provide maximum standards and essential system-wide coordination. Originally, the colleges were developed as components of local school systems and were operated by boards of public instruction. In 1968, the legislature established independent local boards of trustees and gave those boards corporate authority for operating community colleges within the framework of law and state regulations. In 1971, the local school boards were relieved of financial responsibility for community colleges, with the cost now provided largely by the state and additional funding coming from minimal student fees and limited federal grants. State administration and coordination is provided by the Department of Education through the Division of Community Colleges.

From the beginning, Florida's community colleges have been designed as comprehensive institutions. They have served post-high school educational needs of local communities by providing education in the three major areas of adult continuing education—community services, occupational education, and general and academic education parallel to that of the first and second years of the State University System.

Florida's community colleges began in 1933 when Palm Beach Junior College was established as a public two-year college. From that date until 1947, when St. Petersburg Junior College changed its status from private to public, Palm Beach Junior College remained the only public two-year college in Florida. In 1947, the Florida Minimum Foundation Program was enacted, allowing for combined state and local support for community colleges. In 1948, with this incentive, Pensacola Junior College was established and Chipola Junior College, established in 1947 as a private institution, went public.

The legislature in 1955 established the Community College Council, which forecast "The Community Junior College in Florida's Future" in a report published in 1957. This report, which was approved by the State Board of Education, contained recommendations for needed legal changes and a plan for establishing a system of public community colleges in Florida which ultimately would put post-high school education within commuting distance for more than 99 percent of Florida's population. The legislature then authorized the creation of the Division of Community Colleges in the State Department of Education and appropriated funds to begin implementation of a master

plan which resulted in the creation of the colleges listed below:

College	Year Established
Palm Beach Junior College	1933
St. Petersburg Junior College	1947
Chipola Junior College	1948*
Pensacola Junior College	1948
Gulf Coast Community College	1957
Central Florida Community College	1958*
Daytona Beach Community College	1958*
Manatee Junior College	1958
North Florida Junior College	1958*
St. Johns River Community College	1958
Brevard Community College	1960*
Broward Community College	1960
Indian River Community College	1960*
Miami-Dade Community College	1960
Edison Community College	1962
Lake City Community College	1962*
Lake-Sumter Community College	1962
Okaloosa-Walton Junior College	1964*
Polk Community College	1964
Florida Keys Community College	1965*
Florida Junior College at Jacksonville	1966*
Santa Fe Community College	1966*
Seminole Community College	1966*
South Florida Junior College	1966*
Tallahassee Community College	1966
Valencia Community College	1967
Hillsborough Community College	1968
Pasco-Hernando Community College	1972*

*Community colleges with a department designated as an area vocational education school.

History of State Funding

The community college system was created in 1957, and since that time has operated under only two funding allocation formulas, with a few minor modifications made over the years.

Prior to 1973, the method of distribution of the tax dollars was determined through the Junior College Minimum Foundation Program (different from the Public School's K-12 Minimum Foundation Program). The funding model was devised by the state legislature.

The Foundation Program was strictly an enrollment-driven funding formula. The instruction unit was the unit of measurement to determine the college needs, after which the total units were converted into dollars to be allocated to the colleges. In order to determine the number of instruction units, the college enrollment was divided by credit hours to give the number of instruction (teacher) units. The instruction (teacher) units then were calculated and funded at different amounts for each faculty member in terms of rank and longevity. These units were used to determine the amount of funds that were needed for instructional salaries. There were instruction units (other than the teacher instruction units) in the program that were used to allocate funds for support personnel, current expenses, and capital outlay for each college.

The instruction units were based on the fall enrollment for the types of programs given and the number of students served. The enrollments for adult education and continuing education programs were considered in the first Foundation Program in the instruction unit calculation; therefore, the funding system *did* recognize adult and continuing education on a limited basis.

There were several limitations to the Minimum Foundation process, and in an effort to provide a more equitable system, the 1972 legislature enacted into law a new formula for distributing state funds to community colleges. called the Community College Program Fund. Beginning with the 1973-74 academic year, the new funding formula (CCPF) replaced the Community College Foundation Program for determining the state's share of the colleges' operating costs.

The unit of measurement for this formula to determine the college need is based upon the actual cost of instruction per full-time equivalent (FTE) student, as determined by an analysis of college costs during the most recent years of operation. An FTE in this formula represents thirty (30) semester credit hours of instruction or 810 student instruction hours that are converted to FTE units for non-credit instruction.

The cost analysis report that each college is required to prepare and submit each year to the state distributes and allocates expendi-

ture data to courses and disciplines within the following instructional programs:

1. *Advanced and Professional*—These are courses and instructional programs designed to provide the first two years of course work leading to an advanced or professional degree. It includes only credit courses.

2. *Occupational Instruction*—These programs include both credit and non-credit courses and instructional programs designed to prepare for an occupation without subsequent training or education in an institution of higher education, or to provide courses to upgrade job related skills. Many of these courses in Occupational Instruction are transferable to state universities to apply toward a bachelor's degree; however, they are placed in the occupational structure because they are required for an occupational degree or certificate because of their specialized content. This classification standard was adopted to provide consistent classification of those courses which serve both a transfer and occupational preparatory purpose.

3. *Developmental*—These are courses and instructional programs designed to prepare persons for college entry. This would include compensatory education and instructional activities in adult basic education, adult general education, literacy, high school completion for adults, and preparation for the General Education Development Test (GED).

4. *Community Instructional Services*—These programs include non-credit instructional courses designed to meet community needs or to provide recreational or leisure time activities.

Adult Education and Community Service

In 1973, course offerings for adults were classified under the two major categories of developmental instruction and community instructional services. Compensatory and adult elementary and secondary instruction were placed under the major category of developmental instruction, while citizenship and recreational and leisure-time instruction were placed under community instructional services.

Effective July 1, 1975, guidelines developed by a committee of selected community college representatives were implemented in the community instructional services category. The guidelines for citizenship instruction required such instruction to be identified with significant community problems to be eligible for state support from the Community College Program Fund. The six major community problem areas were environment, health and safety, human relations, government, education and child rearing, and economics. The guidelines for recreational and leisure-time instruction excluded such instruction from state support. Prior to the 1976-77 fiscal year, the legislature appropriated funds for the support of community instructional services in the budget of the Division of Community Colleges to be distributed to the colleges on the basis of full-time equivalent enrollments. Such funding was part of the Community College Program Fund until 1976-77, after which it was funded on a separate basis.

The 1976-77 legislative appropriation included a provision assigning responsibility for the equitable distribution of community instructional services funds to the commissioner of education. The provision required the commissioner to develop procedures for the distribution of funds to the school districts and the community colleges for the support of instruction identified with significant community problems related to the environment—health, safety, human relations, government, child rearing, and consumer economics. Priority was to be given to community instructional services that included the cooperative use of facilities and resources of other public or private institutions, agencies, or organizations.

The procedures developed by the commissioner call for the 28 community college district coordinating councils for vocational and adult education and community instruc-

tional services to identify significant community problems in order of priority and to approve the courses to be offered to meet those problems. The allocation of community instructional services funds among the coordinating councils is accomplished by one of the boards in each coordinating council district acting as fiscal agent. Recreational and leisure-time instruction for the aging becomes eligible for state support when the development of recreational and leisure-time skills for the aging is documented by the coordinating council as a high priority community problem. The recreational and leisure-time instruction for other individuals (other than the aging) is not state-supported, but has to be self-supported.

Under the rules of the Florida State Board of Education, fees for courses providing recreational and leisure-time instruction are assessed under rules established by the board of trustees of each college. The aggregate income, from sources other than the Community College Program Fund, must cover, as a minimum, the direct instructional cost of those courses. This requirement is considered to be satisfied when the income derived for all such courses from sources outside the Community College Program Fund is not less than 125 percent of the instructional salary cost for all such courses.

To insure the operation and maintenance of the state community college system in a coordinated, efficient, and effective manner, the 1979 Florida legislature established the State Community College Coordinating Board.

Costs and Sizes of Colleges

When the cost data are used in the current funding formula, it is accumulated in two college groups according to size, and the disciplines are assigned a relative cost level based on the ratio of the discipline cost to the average weighted cost of all disciplines. Therefore, the current formula recognizes that relatively higher costs exist in smaller institutions and that significant variations in costs exist among course offerings. The primary weakness of the existing formula is that it assumes all costs vary directly with the change in FTE student enrollment, which does not necessarily follow. It has also been determined that a greater division in the groupings (by size) of colleges was necessary since there are too many differences among the large colleges to place them in one group with a range of 1,601 to 35,104 FTE. The costs in two of the largest colleges (Miami-Dade and Florida Junior College at Jacksonville) could significantly influence the system's average cost.

The current program structure has made the adult and continuing education programs more visible. The identification of actual cost through the cost analysis and the recognition of cost differences by disciplines in the current funding formula distributes funds more equitably to adult and continuing education programs than did the Minimum Foundation Program.

Additional Changes Needed

The national average population is getting older, and since Florida receives more and more retired citizens, the state and local communities are going to have to respond increasingly to the majority age by providing more lifelong educational activities and experiences for this group.

When a funding formula is once approved by the state legislature, it is very difficult to convince the legislators that the formula needs to change as individual needs change over the years. Most legislatures are so accustomed to a well-structured formula, geared to a traditional student for credit and degree programs, that they find it difficult to accept the notion that it is appropriate and proper to fund other educational needs. We know from past years that there is no problem in getting state funding for credit and degree programs. Practically every college can get funding for anything that is offered for credit courses or as a degree program. Many colleges receive funding for those non-credit activities that are clearly vocational in nature. However, very few commu-

nity college systems fund community-based programs that are in the form of classes. Non-credit activities related to enrichment or recreation are almost never funded; therefore, they have to be self-supported by the user.

Other Funding Sources

1. *Federal support* is available for many types of lifelong education programs, but it does have its drawbacks. It is generally considered as "start up" money or "seed" money; therefore, it eventually does run out and normally the college does not have the available funds to continue with the activities.

2. *Private giving* is another source in its infant stage for community colleges. There is more than one way to establish and maintain this function in a college organization structure. It can be done by part-time staff, full-time staff, or by contracting with a professional consultant who has the expertise to develop a program until such time as the college can have a full-time staff or department to handle this function. Some community colleges, such as Valencia, have reached a size and commitment that such functions are shared. At Valencia, responsibility is divided between a department of the college (office of resource development), and The Valencia Community College Foundation, Inc., which was formed in June, 1974, as a non-profit organization designed to produce private monies to supplement the college's regular financing. The Foundation has its own board of directors, which consists of promiment citizens of the community, and a full-time executive director. The Foundation is empowered to accept gifts of money, real estate, other property, and bequests on behalf of the college, and to confer scholarships and endowments for professorships and facilities or equipment not available from public funding. The Foundation is fully chartered by the state of Florida and recognized as a charitable institution by the Internal Revenue Service.

The Office of Resource Development is mainly responsible for generating financial resources from governmental grants, contracts, and private foundation programs. A well-organized resource development office will more than pay for the cost of the operation of the office and will have the ability to seek not only funds from governmental agencies and private foundations, but can assist the college personnel in finding sources of funds in areas where needed for their special programs. The resource development office can be the central clearinghouse on the campus to review all grant contract proposals to determine whether everything is in order before submitting the proposal to the governing board of the college and the agent who has the funds.

3. *Tuition fee waivers* are being given more each year in Florida under certain conditions. The Florida state colleges and universities are allowed to give a certain number of fee waivers to their own employees, and still earn the FTE for the state funding portion. The 1980 Florida state legislature passed a bill (Senate Bill 902) that requires each community college board to establish rules to waive fees for residents 60 years of age and older on a space available basis (except in programs requiring selective admissions criteria), permitting use of such FTE enrollment as part of the community college's assigned FTE for funding purposes. The effective date of this requirement was July 1, 1980. Several community colleges in Florida had not only been giving waivers to senior citizens before the law became effective, but had been giving them to their employees and members of their immediate families as well. The new law will be of great benefit to the older citizens as well as the college receiving state funding for such FTE enrollment.

4. *Self-supported funding* is the most traditional method of financing adult and continuing education programs. Either the user pays the fees, private businesses and governmental agencies pay the fees for their employees, or both.

The ultimate goal is that of full recognition of the need for continuous lifelong learning and equal funding for all programs of the community college. An activity that is valuable to the community is no less valu-

able because it is a service rather than a credit course.

What Next?

Since Florida has had only two funding formulas for community colleges during the past 23 years, the question is, where do we go from here?

Over the past decade state budgets have become more strained, and many significant needs other than education have emerged. Improved health delivery systems, urban problems, and environmental needs are among the areas competing for funds with higher education. Each area can clearly show needs beyond current funding. Thus, traditionally conservative state legislatures have labored to choose priorities for funding, and in the competition, lifelong education has not fared well.

In many states, as in Florida, the continuing education non-credit programs are expected to collect sufficient revenues from program participants to offset direct costs, and the state legislatures are not willing to fully support these programs with public funds. Yet, there are many sound reasons for supporting expansion of lifelong education programs. Since our majority age is the older adult, the preventive services of active lifelong learning programs could be of enormous financial benefit to the country both by reducing social service costs and by keeping the large elderly population as contributing members of the society.

One of the most important implications is that, since there appears to be a decline in the typical full-time student and an increase in older adults as part-time students, there will be more competition for clientele among institutions within state systems and between the public and private sectors. Institutions are creating new kinds of programs to attract a larger part of the shrinking dollar. The increased enrollment of older and part-time students, becoming involved in different types of research and public service, and providing more career-related programs, will eventually expand the competition. If such competition is allowed, the result could be unnecessary duplication of programs and dilution of revenue so that the quality of education might be lowered each year.

This is already happening in Florida. The Florida state legislature approves appropriations for 67 public school districts, nine state universities and 28 community colleges, and there is no continuity of funding. One year might be the year for the public schools, one year might be more favorable toward the university system, or one year might be the year of the community college; but every year each level of education fights for the same dollar, and the dollars shrink each time.

Lifelong education and credit programs are being offered by the three levels; thus, duplication is creating problems for many institutions. Florida does have a system that is supposed to minimize the duplication, but there is a gap. A better program review vehicle is needed, and clearer definitions should be established to delineate missions and roles for each level of the educational system.

Future Changes in Funding Formulas

Since the Florida community college funding formula has undergone only two major changes in 23 years, resulting in both cases in enrollment-driven models, there have been recommendations to change the direction of allocating funds to the colleges.

Although the current formula has been quite an improvement over that of the Minimum Foundation Program, the Florida legislature recognized a need to improve the process and included the following provision in the 1975 Appropriations Act:

> The Division of Community Colleges shall continue to study the community college funding process with a view toward the development of a more equitable distribution of funds, including means of insuring that colleges which exceed as-

signed enrollments do not adversely affect the funding of the other colleges. Recommendations, if any, shall be submitted to the Legislature no later than January 1, 1976.

The same language was continued in the 1976 Appropriations Act, except that the date for submission of recommendations to the legislature was changed to January, 1977. Therefore, for the past two years, the Division of Community Colleges and the Ad Hoc Committee on Funding (comprised of presidents, administrators, and academic deans of colleges) have been working on an improved process (formula) which would more equitably distribute or appropriate state funds to the 28 public community colleges.

In view of the magnitude of the study, the management consultant and accounting firm of Touche, Ross & Company was engaged to work with the Division and the committee. The firm was employed to conduct an evaluation of the current funding process in terms of fairness and equity in the apportionment of available funds among the community colleges; evaluate and compare alternative processes; recommend the most desirable alternative process; and prepare proposed legislation as necessary to implement the recommended processes. The project was conducted in three phases:

1. An analysis of current fund generation and apportionment procedures;

2. The development of alternative processes;

3. The presentation of final recommendations.

Final recommendations were also to include the results of testing the recommended process under varying conditions and assumptions and detailed rationale and justification for the selection of the recommended process.

After each phase of the study, a written report was submitted by Touche, Ross & Company to the Division of Community Colleges and the Ad Hoc Committee on Funding. The final report was carefully reviewed by the Division of Community Colleges, the Ad Hoc Committee on Funding, the Community College Presidents Council, and the State Community College Council. All agreed that the proposed revision would make for significant improvement in the procedures for the determination and allocation of funds to the 28 public community colleges.

The funding formula was submitted to the 1977 Florida legislature for consideration, but because of concerns with regard to some aspects of implementation, the process was not enacted into law. After the recommended funding formula was submitted to the 1977 Florida legislature and was not accepted, no further attempts were made to convince the legislative body to reconsider the funding formula.

Governor Robert Graham recommended in the 1980 Legislative Program that the current enrollment-based funding processes for post-secondary education be replaced by a budget that focuses more directly on the costs and resource needs of specific educational programs. The recommended funding process will be developed by a state-wide finance study committee, and indications are that the program-based budget will not be required until the 1983-85 biennium. During the interim, 1981-83, it has been recommended by the governor and recently approved by the State Board of Education that the current funding formula be modified by the finance study committee. The modified process will provide funding for a basic program based on enrollment and provide categorical funding for programs to enhance quality and meet priority needs. Transition to a totally new process will require some time to develop, test, and implement.

Conclusions

A recent report from the American Association of Community and Junior Colleges states that the results of two Older American Program surveys and various conferences clearly show that the nation's two-year colleges have made a commitment to serve the educational needs of older adults. A majority

of colleges continue to provide education for part-time older learners despite a climate of fiscal restraint. Older adults are increasingly seeking help from their local community colleges in retraining and acquiring skills that can lead to learning opportunities and have encouraged colleges to expand the counseling, training, and job referral services.

Valencia Community College has had a strong commitment for several years from the board of trustees, president, and staff in providing adult and continuing education programs to all citizens in the two-county area it serves. Currently there are approximately 15,000 (headcount) students enrolled in these types of courses and programs in 150 locations, in addition to the credit courses that are provided to the on-campus students.

The history of the community college system, the changes made in the program structure and funding and the implications they will have on lifelong learning, and the recent recommendations made by the governor on future financing confirm that Florida is doing much to provide opportunities and services to all citizens in the state. When the program structures and funding formulas are being revised in the next two years, a strong commitment should be reflected in such changes for lifelong education.

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Final Report: Florida Assembly on Policies for Lifelong Education

Florida has one of the most outstanding community college systems in the nation. The present 28 districts fulfill the 1957 long-range plan to deliver postsecondary education within commuting range of nearly all Florida citizens. Over 700,000 people are participating in this opportunity each year. This Assembly specifically described the situation with these words: "Lifelong learning in Florida provides easily accessible educational opportunities throughout the state to meet the personal, professional, and occupational needs of the citizenry."

Florida is also recognized for its unusual balance of local control with state coordination and support. The state has many strengths with which to face the future learning needs of its population.

Members of the Assembly considered the drastic social and cultural changes expected during the rapid population growth in the decades of the 1980's and 1990's. They discussed the structure and organization of institutions undergoing rapid substantive change; they also attempted to provide in their recommendations for the adjustments to an unknown future.

A number of specific recommendations which follow also reflect the Assembly views that current policies and legislative mandates are needed that accurately reflect the diverse present programs and services provided by community colleges.

The action recommendations of the Florida assembly on Policies for Lifelong Education are directed to nine specific groups: state government, the legislature, the State Community College Coordinating Board, the Division of Community Colleges, the Postsecondary Education Planning Commission, the 28 local coordinating councils, the local boards of trustees, the individual institutions and their administrators, and the citizens of Florida.

To the State Board of Education, the assembly recommended:

1. That the state plan for public education should include distinct provisions for the support of and the authority to provide appropriate lifelong learning programs. That the state plan encourage and recognize all the providers and non-formal community-based learning opportunities.

2. The support and endorsement of a funding system other than the current enrollment-driven process (based on Full Time Equivalent—FTE) because
   a. the large numbers of part-time students participating in lifelong education necessitates a more modern funding formula, and
   b. such new methodology should enable institutions to provide the same scope of services to part-time students as are normally available to full-time students.

3. That the state consider the feasibility of funding career awareness centers, perhaps on a regional basis.

4. That the state of Florida maintain its commitment to fund basic skills components

necessary for coping in a contemporary society, recognizing that:
a. these skills may differ by age, origin, and geographic distribution of the population,
b. institutions also need to continuously monitor, evaluate, and update these skills.

5. That Florida maintain its commitments to appropriate occupational classes and courses, and to community development activities at levels with the basic skills described above.

6. That the state re-define the roles of differing institutions in lifelong education, with a goal of statewide planning and coordination to eliminate unnecessarily duplicative programs. Advisory committees at the local level should be used in this process to assist in determining needs of particular populations, such as those of senior citizens. The planning and coordination process should identify learning needs which are not currently being filled by existing services.

7. That state and regional agencies and economic development associations charged with the responsibility of attracting industries to Florida should inform and promote the availability of the comprehensive lifelong learning programs.

8. That local boards of trustees of community colleges be recognized as being in the best position to identify local lifelong learning needs. It is recommended that the executive and legislative branches not impede the prerogatives or capabilities of the local boards to quickly and effectively respond to these local needs.

9. That research be conducted to:
a. identify alternative models for funding lifelong learning, with research extended to include models from other nations as well as the United States;
b. study the economic impact of lifelong learning programs on the individual and also on publicly supported health and social service agencies (such as mental health, offender rehabilitation, and programs for the aging).

10. That the concepts of education information centers and educational brokering be expanded to the local community college level, including sponsorship of lifelong education fairs (similar to the Tampa model), and including newspaper, television, and radio information segments.

11. That the universities be encouraged to emphasize the skills requisite to working with students in lifelong learning situations.

To the Florida legislature, the assembly recommended:

1. Reaffirmation of its support of the mission of Florida's community colleges, which mission should include (but not be limited to) the concepts of lifelong education. Specifically, the assembly recommends that the community college statute be amended to include "lifelong education of traditional and non-traditional students."

2. That the legislature revise the community college funding structure to insure reasonable access to lifelong learning opportunities for all Florida citizens. To accomplish this recommendation, the legislature could address the following issues:
a. FTE versus headcount enrollment funding;
b. program-based funding;
c. funding for non-instructional services;
d. funding for new programs because funding often lags for some programs that are needed in a rapidly changing society (state discretionary funds be provided to financially support such programs);
e. equitable student fee structures;
f. student-aid programs for non-traditional students;
g. priorities of credit versus non-credit programs.

3. That the funding for lifelong learning should be considered equally important with funding of traditional programs. Specifically, when the program structures and funding formulas are being revised, consideration should be given to the extra costs of servic-

ing a predominantly part-time student population. This would include such cost centers as counseling, registration, facilities, and equipment.

4. That there should be an assessment of local and regional lifelong educational needs with appropriate methodology to foster commonality and comparability of results for the purpose of planning and minimizing duplication of services. The assessment should address the following:

a. identification of target groups (life patterns),
b. program offerings,
c. delivery systems, and
d. gaps in service.

Specifically, the legislature should provide categorical funds for on-going needs assessments. The community college will conduct the needs assessment with broad-based community input from community groups such as: coordinating councils, Chambers of Commerce, local employers, unions, HRS —health rehabilitative services, industry services task force, community agencies, private institutions, Comprehensive Employment and Training Act, the silver-haired legislature, and the Department of Corrections, among others.

5. That a commitment be maintained to provide programs that will assure all citizens the opportunity for attainment of necessary skills to deal effectively with a rapidly changing society.

To the State Community College Coordinating Board, the assembly recommended:

1. That recognizing the emergence of community colleges as leaders and catalysts for lifelong education in Florida, a position paper be developed on the mission of the community college in lifelong education. The paper should include:

a. a definition or description of lifelong education in a universal sense;
b. the role of the community college in Florida with respect to programs, cooperative arrangements, and community development; and
c. the setting of goals for the role that community colleges in Florida will play in developing the reality of a learning society and improved quality of life in the 1980's.

2. That acknowledgement and planning consideration be given to the forces of technology that are impacting the society and culture at an accelerating rate. For example, the integration of the mini-computer, the video screen and the telephone, as well as radio and television, have enormous possibilities to enhance opportunities for learning. Specifically, the assembly recommends that colleges be provided with resources and incentives to provide non-traditional learning modes of instruction with reward systems that encourage faculty to engage in these new technological delivery systems. Technically oriented business and industry should have a major partnership with the colleges in applying new technologies to expanding educational opportunities geared to lifelong educational needs.

To the Division of Community Colleges, the assembly recommended:

1. That visible and concrete examples of ongoing cooperative ventures in lifelong education are desirable and needed.

2. Specifically, the assembly asks the division of community colleges to create an index that measures the extent and scope of a college cooperative enterprise, and that a reward system or method be developed that encourages more of this. This index methodology should gauge the level of cooperative activities and their degree of impact.
impact.

3. That efforts be continued to remove barriers to lifelong learners and to improve their access to programs and services.

4. That seed money be provided to foster cooperative local projects to address identified local problems. These demonstration or pilot programs could be funded by a five cents per citizen allocation to the cooperating agencies.

5. That the division of community colleges take the lead in developing state public policy to meet the financial aid needs and eligibility criteria for part-time students.

To the 28 local district coordinating councils, the assembly recommended:

1. That councils implement the concept of state planning and coordination based on local needs assessment, planning, and input from cooperating local agencies. Specifically, Florida should utilize the existing 28 coordinating councils for direct, formal input from concerned community agencies, advisory committees, and lay persons.

2. That coordinating councils be expanded where necessary to include representatives from local community groups.

To the Postsecondary Planning Commission, the assembly recommended that:

1. Florida's newly established Postsecondary Planning Commission give emphasis in its work to the needs of lifelong learners, and the policy changes needed to serve their needs.

2. Help be given to practitioners in lifelong learning to identify the individuals who control policy making and funding at national, state, and local levels. Further, that a list of exemplary practices for influencing these individuals be compiled and distributed to all interested institutions in Florida.

To the Boards of Trustees, the assembly recommended that:

Local boards adopt policies and procedures which foster lifelong learning, and which are based on the results of local needs assessment. To implement this recommendation, modifications in current policies and procedures will be required in the following areas:

a. administrative services—review of Community College Management Information Systems (CCMIS) in terms of appropriateness of reporting methods, staff development (awareness, sensitivity), teacher education, marketing the concept of lifelong education, public relations (image in the community, communication);
b. instructional services—provide for various modes of study, including but not limited to independent study, remediation, credit for life experience, competency testing, and credit by examination;
c. student services and recruitment—provide for intensive community outreach efforts to include more of the underserved, such as veterans and the disadvantaged, commitment to non-traditional financial aid, admissions, registration, orientation, counseling (career, personal), child care, referral and brokering;
d. delivery systems—provide for community outreach utilizing mobile units (vans/trailers), service to institutionalized clients, such as personnel in correctional institutions, nursing homes, hospitals, etc., use of community centers, variation in scheduling, such as out-of-phase, weekends, evenings, 24-hour time blocks, etc.
e. facilities and access—explore the use of multi-media (TV, radio, newspaper), computer-assisted instruction, development of tapes for individual use, creation of learning labs (on campus, in the community, in the home), telephone for information and referral, on-site programs in industrial complexes, use of "variable time/variable credit."

To the individual community college, the assembly recommended:

1. That each community college examine present policies and procedures to verify their applicability in serving *all* students (and are not limited to the traditional student population). Each institution should clarify its commitment to lifelong learning and clearly communicate this both internally and to its public.

2. That community colleges join with other community organizations to sponsor local assessment and other activities to obtain a picture of lifelong educational needs. In addition, community colleges should develop programs which respond to the identified needs of specific segments of the population.

3. That community colleges should serve as catalysts for promoting cooperative efforts among public and private agencies to build, equip, and staff joint-use facilities. Examples of these facilities include libraries, schools, recreation facilities, auditoriums, health facilities, and child service clinics.

4. That one important objective in institutional cooperation and coordination is to prevent unnecessary duplication of services to the lifelong learner.

5. That Florida's institutions of higher education should explore the potential of all media, especially television and radio via cable/satellite, in terms of providing a variety of educational activities.

6. That community colleges utilize all possible additional delivery systems and not limit themselves to the traditional systems.

7. That community colleges also provide indirect services for the lifelong learner through a community brokering process.

8. That community colleges should continue to offer personal enrichment opportunities on a self-supporting basis, providing financial aid and other special provisions available to economically deprived individuals.

9. That colleges should consider the use of staff and program development (SPD) funds and other appropriate financing to ensure that all staff and faculty understand adult learners and are competent to deal with them as individuals. The assembly recommends that the colleges consider the provision of peer counseling, and an emphasis on the need to convey an attitude of acceptance of the student, irrespective of the student's age or purpose of attendance.

10. That part-time faculty and lifelong learning needs are intertwined as a managerial and organizational problem. There is a need to assure equal quality control measures for part-time as well as for full-time faculty. Specifically, the assembly recommends that all community colleges provide appropriate in-service training activities for faculty (including part-time) designed to utilize their talents to their full potential in meeting the lifelong education needs of a learning society.

11. That colleges consider and discuss the priorities of credit versus non-credit programs and their effects on the emerging institutional commitment to lifelong education.

12. That a more sophisticated productivity model than the load hour is needed. The load hour is a unit of measure of a faculty member's productivity.

To Florida citizens, the assembly recommended:

1. That community colleges can play a major and active role in serving lifelong education needs, but that they cannot be everything to everyone.

2. That there is a need to provide for the diversity and needs of both the rural and urban areas of Florida.

3. That public policy in lifelong education should be comprehensive, covering cultural and social development as well as occupational development.

4. That users of recreational and avocational services should pay for maintenance of such services.

5. That continued participation in lifelong learning provides benefits both to the individual and to the entire community.

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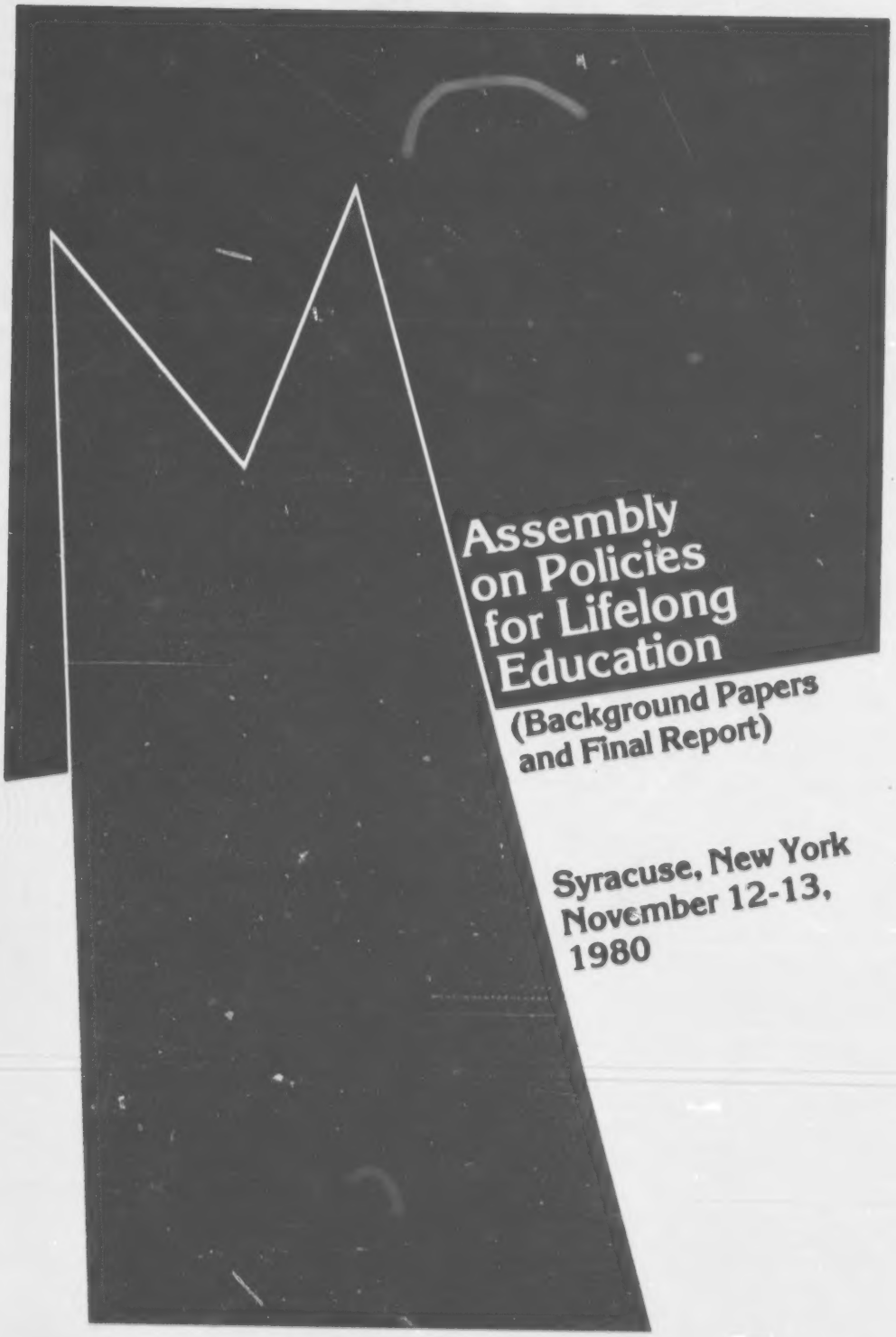
NEW YORK ASSEMBLY ON
POLICIES FOR LIFELONG
EDUCATION

(Background Papers
and Final Report)

Syracuse, New York
November 12-13, 1980


Assembly
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Setting Goals for the Future of Lifelong Learning in New York State

Your participation in a regional forum is a crucial contribution to our state's effort to set goals for lifelong learning for all its citizens. The background and purposes for the forums are explained in the appendix.

Looking Forward to the Year 2000

The year 2000 is 20 years away—far enough into the future so that there is still an opportunity to influence events to a significant degree, yet close enough so that some decisions must be made soon if there are to be significant changes from what might otherwise happen, without planned intervention.

The rapidity of change will insure that no amount of education during youth will prepare adults* to meet fully the demands that will be made upon them. To cite just two examples:

- Technology and the national and world economy will generate many job and career changes for most adults that will require frequent and extensive learning.
- Changes in the relations among nations will require decisions by the public that must be grounded in broad understanding of other cultures and international politics. Yet, no one can anticipate very far in advance what specific areas of the world will call for attention.

In preparing the Goals Statement, the Council on Adult Learning Services took cognizance of the many alternative futures that have been projected for the year 2000. While members held differing views of the future, there was solid agreement that

- adults learn throughout life,
- active learners get more out of life and give more to their society, and
- conditions in 2000 will necessitate learning throughout life.

In reviewing the goals, readers are asked not to be constrained by resource limits, competing social priorities, or the political factors that will influence the realization of the goals. It is assumed, in this approach, that if there is sufficient commitment to goals set 20 years into the future, strategies can be devised to deal with the constraints.

Indeed, the next step in the process is to develop strategies for achievement of the goals. This consists basically of determining what must be done in the near term (this year and next) and beyond to put society and education on track to realize the goals by 2000. It is at this point that the realities of resource limits, competing social priorities, and politics have to be taken into account.

This is a background paper for New York's regional forums on lifelong learning prepared by Adult Learning Services, The State Education Department.

*By "adults," throughout this paper and in the forum discussions, is meant persons who have taken on the roles and responsibilities of adulthood. For such individuals, education is not the sole or primary activity, as it traditionally has been for many 16-22 year-olds in our society. They are usually studying part-time school through postsecondary education, and they have special characterstics and needs which will figure prominently in the following pages.

What Role for You?

These forums are designed to solicit your views on these proposed goals, and to pose these questions only you can answer:

1. Does the picture of your fellow adult New Yorkers presented here fit the people you know in your community, organization, or agency?
2. Does the vision of a "learning society" portrayed here fit your image of the probable and/or desirable future?
3. Taking the goals one by one, do you support each one, or would you change or modify it, and how?
4. What are the major problems you foresee in reaching these goals in your community?
5. What are the most important next steps which you, your community, organization, or agency—and the Education Department—should take to follow up?

Following each goal, there are a number of additional questions designed to help promote discussion of the goals. During the forum, each participant will be given an opportunity, in small groups, to focus on the goals and questions of greatest concern to him/her.

Adult Learning in New York State Today

Adult learning is an idea whose time has clearly come. We all have friends and neighbors who have returned to school, or are advancing in their jobs through training programs, or who take courses in the evening to pursue an urge to learn.

Moreover, everyone seems agreed that the answer to many of our personal and social problems lies in upgrading the capacity of individuals to cope, and to enhance their quality of life. The unemployed need job skills, young workers need skills leading to a better job, women who missed out on higher learning early in life need a second chance, older people need the comfort and stimulation of learning.

But just what does all this talk of lifelong learning refer to?

Basically it signifies the fact that (1) Americans are increasingly learning and growing throughout their lives, in all kinds of ways, for all kinds of reasons, and (2) new opportunities and services are needed to meet the rising demand and need for adult learning, and to reach unserved people or meet emerging social problems.

Much of the adult learning that is going on is spurred by "future shock"—that unremitting series of major changes in our lives, society, and culture. Today, nobody's education, no matter how fine, can be completed with the end of formal schooling. The "half-life" of knowledge in many fields is ten years—after that, 50 percent of what was learned is obsolete. It's not hard to think of numerous jobs, technologies, ideas, problems, and challenges in our lives that did not exist ten years ago.

As a result, more and more adults are learning, and educators are providing a rich array of services to support that learning. There's a growing grassroots commitment to the policy adopted by Congress in 1976 in the "Lifelong Learning Act" that "American society should have as a goal the availability of appropriate opportunities for lifelong learning for all its citizens without regard to restrictions or previous education or training, sex, age, handicapping condition, social or ethnic background, or economic circumstance."

New York State today leads the nation in fostering lifelong learning. Adults throughout the state have rich resources and opportunities for continuing their education and development.

The booklet, *Adults Learning Here***, portrays how the State Education Department, and other public and private agencies, serve New Yorkers. Through these opportunities, adults are constantly extending their skills, knowledge, and understanding.

**Available from Adult Learning Services, State Education Department, Albany, New York 12234.

Unmet Needs, Unserved Citizens, Unsolved Problems

Despite these myriad opportunities, there is compelling evidence of unmet needs, unserved citizens, unsolved problems.

- Adults most in need of further education are least likely to obtain it.
- Most adults report barriers that block their participation.
- Quality may be declining in some areas.
- Certain regions of the state are unserved or underserved, particularly rural areas.
- Learning opportunities still tend to be provided at times, places, and in modes that are most convenient to the providers, rather than accommodating the needs and preferences of learners.
- There is a "missing link" in meeting adults' needs for learning opportunities: information and guidance so that individuals can find and use these opportunities.
- The learning done by adults is not sufficiently recognized, assessed, and rewarded with official validation, especially when it takes place outside formal education.
- Funds for adult learning are inadequate, and as a result, in part, too few persons work full-time professionally in educational programs for adults.

The challenge facing us is highlighted by some harsh statistics. In the latest year for which figures are available, *36% of adults in our state (age 25 or over) lacked a high school diploma* or equivalent—and this does not include out-of-school youth or the burgeoning numbers of illegal immigrants and refugees. Moreover, despite having the nation's largest population of 16-year-old persons out of school, and without a high school diploma or equivalent, New York State provides *less than 1% of the total dollars* devoted to helping these people. The national average amount of state expenditures for this purpose is $6.55; some states spend considerably more (California spends $35) but New York spends *only 72 cents*.

The proposed goals discussed in the pages that follow aim at meeting these needs, reaching the unserved, and using lifelong learning as the lever to improve the lives of individuals and the quality of life in New York State.

Goal #1: Scope of Lifelong Learning: Who, Why, How

"Accelerating change requires that we all become lifelong learners."

Alvin Toffler

The present scope of lifelong learning in New York State is impressive. Consider these statistics:

- The state's public schools serve thousands of adult students each term with a wide variety of courses and other learning experiences. In some school districts the adult enrollment far exceeds the number of children in the public schools, and often involves upwards of one-third or even one-half of the community's adult population.
- Adults are the new majority on the state's college campuses, comprising 54% of all participants (degree credit, non-degree credit, and non-credit). One out of every four students pursuing a degree in public higher education is an adult (25 or older). Adults comprise more than one-third of the total degree credit enrollment, when undergraduate and graduate figures are combined. Three out of every four graduates of public higher education are adults.
- BOCES (Boards of Cooperative Educational Services) provide vocational and occupational training for 80-90,000 adult New Yorkers every year.
- 14,000 adults throughout the nation are pursuing regents external degrees.
- 2,000 adults are pursuing degrees through televised courses.
- Our state population numbers 18 million, yet almost 30 million visits were made to our museums in 1978.
- Over 80 million attendances were registered at organizations sponsored by the State Council on the Arts in the same year.

- Our public libraries are used by 51% of the state's adult population.
- Millions watch "Live from Lincoln Center" and other New York-based programs in addition to the wide variety of cultural, educational, and science offerings on public television.
- Some 700,000 state employees receive training each year through business and industry.

These figures are certainly impressive. But they point to a growing *demand*, rather than an adequate *supply*, of adult learning opportunities. For these participants tend, as we have seen, to be already educated and relatively well-to-do. While such learning opportunities for those who can afford them are available in virtually any subject, *public* support goes primarily for a limited range of offerings: postsecondary credit work, occupational education, training in basic skills.

In short, *the adult who cannot pay for education, who wants to learn, needs to learn, and is ready to learn, is more often than not excluded—a situation we now consider intolerable for children and youth.*

Moreover, even for those who gain entree to learning opportunities, our educational system is still youth oriented. Institutional priorities and procedures are often geared to the young. Service to adults is seldom on the agenda of policy makers. Public policy rarely recognizes and reinforces the importance of lifelong learning.

For the future, the state's Board of Regents has announced its intention to advance further towards a system of lifelong learning. In its annual "Program Directions Statement," issued earlier this year, the Board declared:

> In the past, adult education has been peripheral to the mission of most institutions within the University of the State of New York and peripheral to the State policy and appropriations for education. To perpetuate the relative neglect of adults by the educational community in the 1980's would be a costly mistake for the State and its citizens. The Regents will make a particular effort in the next few years to explore the needs of adult learners, to encourage careful planning (in conjunction with industry) to meet those needs in a cost-effective manner, and to support institutional and local initiatives aimed at integrating adults into the mission of the University of the State of New York, as well as serving adults in non-traditional settings where these are more appropriate. Counseling and referral services are a particular concern for adult students, who are often not enrolled in a full-time comprehensive program of study. Student and institutional aid formulas designed for the young full-time student need to be re-examined to see that quality standards are maintained in programs aimed at adults, as they are in other educational programs.

Goal #1 for 2000: The Scope of Lifelong Learning

In the year 2000 education is "age neutral." Learning by adults is a natural continuation or redirection of prior learning. Learning activities are supported by a flexible and diverse array of services that are based on the recognition that learning is lifelong and takes place in many different places and circumstances. Adults are actively involved in the planning of learning services that are available to all as a matter of right. Adults are free to choose those services that best meet their individual learning needs and styles at each stage of life.

There are no economic, geographic, or physical barriers to full participation in learning activities. Activities support the full range of learning objectives: personal, social, and career development, preparation for family and civic responsibility, and enjoyment of leisure. Learning helps individuals cope with an increasingly complex and crowded world through such means as intergenerational and multi-cultural experiences. Providers of learning services are aware of and responsive to adult learning needs and use a great variety of delivery

modes. Work schedules and employment policies support involvement of workers in education. Public policy is reflected in the allocation of funds for adult learning. Public policies recognize that formal and informal learning are necessary and appropriate adult activities, and that participation in learning activities may be on a continuous or intermittent basis. The solution to many social problems is seen as residing in a better educated adult population.

Some Suggested Issues for Forum Discussion

1. Should adults have a right to learning services? If so, what limits should be placed on this right? Does this require that adult learning be supported with public funds?
2. Should some kinds of adult learning have higher priority for public support? If so, how should priorities be set?

Goal #2: For Whom: The Learners

Can We Break the "Iron Law" of Adult Education?

When we look closely at the participants in adult education, we find that the more advantaged a person already is, the more likely he or she is to take advantage of further learning opportunities. Learning fosters learning; education quickens the appetite for more education.

"The more, the more" seems to be an iron law of adult learning. A major question for the future is: Can and should this law be broken?

The law leads to an increasing gap between the well-educated and those left behind—despite the many public efforts to reach the disadvantaged. The most frequent participant in adult education in New York State today is:

- white
- a high school graduate
- employed more than 41 hours a week
- annual family income of $10,000 or more

Conversely, the person least likely to participate is:

- black and Hispanic
- elderly
- less than a high school education
- annual family income of less than $10,000
- living in central urban or rural areas.

Moreover, this gap appears to be widening. The greatest increases in educational participation have been made by white women with college degrees and family incomes of $25,000 a year or over.

Goal #2 for 2000: For Whom

Services are available to all adults regardless of differences in age, sex, physical condition, racial, cultural and ethnic background, economic and social status, intellectual ability, and learning style. Anyone who desires knowledge and/or skills is able to learn anything he/she is interested in, and capable of, learning at whatever pace is appropriate and in an environment compatible with cultural differences and needs.

Some Suggested Issues for Forum Discussion

1. Is it enough to make opportunities available or should positive efforts be undertaken to ensure that adults in need of education receive it?

Note: The goals quoted here and throughout this paper are those developed by the Statewide Advisory Council on Adult Learning Services, appointed by the Commissioner. The goals are written from the perspective of the year 2000. The present tense is used to emphasize that the statements are expressions of intention, and neither *predictions*, which would have been suggested if "will" had been used, nor prescriptions, which would have called for the use of "should."

2. Should differences of ability to benefit from education be recognized in the provision of opportunities?
3. In situations of shortages of opportunities for learning, how should decisions be made, and who should participate?

Goal #3: By Whom: The Providers

"We found 614 different learning programs available in a 25 × 25 block square in the center of the city."

A municipal study

Our society brims with opportunities to learn. It has been estimated that over half of American workers are involved in the processing of information.

A myriad of institutions and resources provide adults with opportunities for education:

- public school adult programs
- BOCES
- colleges and universities
- libraries and museums
- unions and employers
- social agencies and community-based organizations
- the media
- learning centers, producers of learning materials, and informal study groups
- counseling centers
- government agencies and agricultural extension
- CETA prime sponsors
- churches and synagogues
- the military.

On the campuses, colleges and universities are serving adults with a variety of "non-traditional" programs, including "external degrees"; special programs for women, the elderly, and others; courses at convenient times such as on the weekends; and televised courses.

But even as higher education expands its services to adult students, there will still be a learning marketplace of other providers of educational opportunities. Such an open marketplace has all the advantages, and disadvantages, of a market situation in any field.

The challenge for the future is to maximize the advantages and obviate or address the problems—gaps, poor quality, duplication—of such a system.

Goal #3 for 2000: The Providers

The types of provider organizations may not be greater in diversity, but many more individual organizations are offering learning services, particularly employers and unions. Collaboration among providers is extensive.

The media play a greatly enlarged role, as do producers of materials for use by individuals and small groups of learners studying together.

Many more adults do some teaching during their lifetimes. Teaching personnel are especially competent in designing courses of study, using media, and helping others to learn. They, like all professionals, require continuing study to maintain competency. Providers of learning services determine and respond to adult learning needs and provide access to varied and action-oriented projects. Providers have a system for articulating their respective offerings so that the former sharp division between adult education programs and postsecondary programs is eliminated. Providers are engaged in joint planning, curriculum and staff development, needs assessments, and pooling of resources. There is a special responsibility of the state and federal education departments to provide the impetus and leadership for such cooperative arrangements, including financial incentives to encourage collaboration among providers.

Some Suggested Issues for Forum Discussion

1. How should respective roles of different providers in a community be determined in order to maximize effective use of resources?

2. Should special responsibilities be assigned to specific institutions, e.g., teaching basic skills to local school districts?
3. How should the heavy public investment in the public school and colleges be taken into account as the numbers of providers increase?
4. Should all providers be subject to some standards, or just those receiving public funds?
5. How can effective collaboration between education and industry be achieved?

Goal #4: Where: Towards Learning Communities

"Not I But the City Teaches."

Socrates

For much of American history, learning went on constantly throughout the community: through apprenticeships at shops and stores, in libraries and Lyceums, in town meetings and around the stove at the general store, in churches and synagogues, in close families that passed along an intact culture to each new generation.

In our time, education has come to be encapsulated in special institutions: principally, schools and colleges. Such centralization has served us well over the past hundred years, as a system of education for children and youth who can and do spend the better part of their time involved in formal learning. But it is *not* suitable for adults, whose learning must be fitted into busy lives and hectic schedules. For them, learning opportunities must be made much more flexible, convenient, and diverse.

Fortunately, learning opportunities are beginning to permeate our communities again, sometimes in distinctly contemporary ways. (Executives aboard Long Island commuter trains can take management courses on the way to work in a specially equipped "classroom on wheels"; adults in the Syracuse area can earn their GEDs through an "external" program that is based on the competencies they use in everyday living; women with children at home can take televised courses in many regions of the state.)

Some adult learners prefer non-school settings, particularly among those with less than a high school diploma who favor learning at home or in a community setting. But many middle-class learners, too, prefer the privacy of televised courses as their introduction to college instruction, fearing to face a classroom of younger students or even other adults. Moreover, as the cost of personal transportation soars, it is likely that more and more would-be learners will find car trips to a distant campus a financial burden.

Goal #4 for 2000: Where

Learning opportunities are provided at many locations to take into account the convenience of students and the efficient use of all community facilities, including schools, colleges, shopping centers, and work sites. There is increased sharing of sites, e.g., colleges offering programs in high schools, shopping centers, and work places. There are a variety of combinations of providers sharing a common site, e.g., a high school, a college, a BOCES, all offering programs at a community center. Support services, such as day-care, counseling, health and social services, are also offered at many learning sites. The home is an increasingly important learning site, and there is increased attention to the family as a learning unit. Through various media, particularly computers and television, information and instructional programs are available in homes.

Some Suggested Issues for Forum Discussion

1. Should public funds be used to promote facility sharing?
2. Should there be any limit on sites for learning?

3. When new facilities are needed, who should provide them?
4. Who will be responsible for programming, for home learning, and for strengthening the role of the family?

Goal #5: When: Accommodating Learners

"The readiness is all."

Shakespeare

Most adults find that problems of timing, convenience, and scheduling often block them from learning. "Home responsibilities, inconvenience of class schedule, and cost of tuition are the barriers to participation named by the largest number of adults," according to a survey of *Needs and Interests of New York State Adults* conducted by Cornell University for the State Education Department.

Many adults overcome these problems by going to school part-time. Indeed, most of the part-time students on the campuses today—and their numbers are burgeoning—are adults. And among adults who have returned to education, most attend as part-timers.

These part-time students are pioneers in finding ways to fit into their busy lives the learning they want and need. Significantly, when one looks closely at them one finds that they are:

- older than full-time students
- likely to be women and minority group members who tend more to part-time than to full-time study
- likely to be employed
- more likely than full-time students to be "financially independent"
- likely to be academically good students
- likely to have "financial need."

Responding to these students' needs, many schools, BOCES, colleges, libraries, and other agencies throughout the state now offer programs at convenient and flexible times. Courses are offered in the evening or through "Weekend Colleges," or on-site sessions are minimized and combined to save time. Courses by television and by correspondence permit thousands of students to participate without leaving their homes. Some institutions will admit students at any point for short courses or self-paced instructional programs in which the student does not have to fit into an on-going class.

But there is still much that could be done to make learning more accessible and convenient for adults. Today, most educational activities continue to be scheduled at the convenience of the institution and its staff. Adjustments are made sometimes to meet the special needs of adults, but these changes remain minimal.

Moreover, the emphasis of the entire educational system focuses on earning degrees and credentials, which are considered terminal as in the past. Most people think that a bachelor's degree signals the "completion" of higher education, or that a master's prepares one for a lifetime of professional work. In reality, the "half-life" of knowledge in most fields nowadays is 6-10 years: within that period, 50% of what one learns will be obsolete.

Education must, therefore, be spaced throughout life.

Goal #5 for 2000: When

Adults pursue learning continuously throughout life, and the concept of lifelong learning is fully accepted. Work and education are closely related, and learning on the job is regularly recognized in education assessments. At times, periods of study alternate with periods of work; at other times, both occur simultaneously.

Planned learning activities take place at times governed by learners' needs. Providers are responsive to those needs through such arrangements as continuous admissions, short-term offerings, modular learning packages and flexible scheduling. Flexibility is the norm, rather than the exception.

Credentials are viewed not as terminal points, but as indications of accomplishments "to date."

Suggested Issue for Forum Discussion

How should the relationship between work and learning be promoted?

Goal #6: Information and Guidance

"Not to choose is to choose."

Proverb

Choosing wisely among learning opportunities is one of the most difficult decisions facing an adult. Most people are unaware of the wide variety of programs and offerings that might meet their needs. Increasingly, education comes in diverse "packages" varying in cost, convenience, style, and prestige.

Many adults are not even clear in their own minds on what their needs are. They would benefit from sensitive help in clarifying their life-goals, discovering how they might best use education to achieve some of those goals, and how they like to learn.

As a result, a whole new specialty has emerged: "educational brokers." Their job is to "broker" between the needs of the individual adult *learner* on the one hand, and the myriad of *options* to meet those needs, on the other. The broker can help the learner figure what he or she really wants or needs, inform the learner about the possible ways to get it, and help the learner gain access to those opportunities. Brokers also sometimes act as advocates for individuals, or for categories of learners, to pressure institutions to serve them better.

Another recent development designed to provide information and guidance to learners is the Educational Information Centers program conducted by the state. This system endeavors to make information and help available to learners in the most effective and efficient manner possible, employing public libraries and other agencies.

Despite these recent initiatives, however, most information and guidance services today are offered by providers of instruction. Since most of these institutions have been serving primarily young people, and since they now need to recruit adults as the youth population declines, there are obviously inadequacies and possible dangers to the consumers in relying on them to counsel adults.

Goal #6 for 2000: Information and Guidance

Learner-oriented information and guidance services are available to assist adults with personal, educational, and career planning and development through a state-supported network of regional Educational Information Centers. Counseling opportunities are available at all times. Services are well publicized to encourage use. The Centers directly or through a network of cooperating agencies:

a. Provide access to all individuals in the region by offering services at all learning locations (see Goal #4) including homes, by using a combination of paraprofessional and professional staff and such media as telephones, computers, and cable TV.
b. Train consumers in the wise and discriminating use of all forms of educational information, and serve as advocate for individuals in relationships with providers.
c. Provide an opportunity for every learner to develop an individual education plan.
d. Make special efforts to reach and serve various groups, such as the handicapped, elderly, illiterate, non-English speakers, and other who experience special difficulties in gaining access to learning opportunities.
e. Solicit and update information describing services available from all providers,

including such support services as child care, aid for the elderly and the handicapped, and financial aid. Incorporate relevant information from other sources, such as former participants in educational programs.

Suggested Issues for Forum Discussion

1. Should the state fully support the Information Centers, or should there be some charge to users?
2. Should special efforts be made to reach those who do not initiate use of the services by themselves, or is it an adult responsibility to seek help when needed?
3. How can the quality and accuracy of information be assured?

Goal #7: Quality Control: Giving Learners Value

"Lifelong Learning could become a populous fraud."

John Gardner

The consumer movement has awakened us all to the need to assure quality in the marketplace. That basic principle applies, whether the product is an automobile or a course of instruction.

Most educators are dedicated and honest, but education is not immune to the kinds of abuses, excesses, corruption, and outright crookedness that occur everywhere in society when things are bought and sold.

Thus, the state has periodically found it necessary to crack down on flagrant abuses: "satellite programs" of established colleges that do not meet the standards set for off-campus programs, proprietary schools that promise more than they can perform in preparing people for jobs. "A great disservice may be done to students and to society by less-than-adequate degree programs," the Council on Postsecondary Education Accreditation has said, warning that "some institutions are awarding inferior degrees based on off-campus study because they are desperate to pull in tuition income."

Significantly, the first four overall goals of the state's *1980 Plan for Postsecondary Education* is concerned with excellence. Such concern with maintaining and improving quality should clearly inform the state's efforts in adult learning, too.

There are two basic approaches to quality control: strengthening *consumer choice*, and *state regulation*. Obviously, informed choices by consumers should be the basic strategy, with the state intervening to assure that minimum standards are met, that the consumer is not defrauded or coerced, that advertising is fair and truthful.

Today, however, the primary reliance for quality control in adult learning services is on *regulation* by federal and state agencies plus accreditation by national and regional voluntary accrediting associations. The consumers play a limited role, limited largely to "voting with their feet."

Better information and guidance services, and professionals who can collate and interpret knowledge about the value of various providers' offerings (see Goal #6) should improve this situation.

Goal #7 for 2000: Quality Control

Evaluation reports and related information concerning programs and services are readily accessible to all. Informed choice by consumers is the key to quality control. Minimum standards are set by a *public* agency, with advice for providers, consumers, and interested groups. The agency:

a. Sets minimum standards and determines which providers meet those standards and are, therefore, eligible to provide services supported by individual entitlements. (See Goal #9.)
b. Sets standards for information to be provided by all providers and has authority to compel disclosure of relevant informa-

tion, conduct audits, and employ independent evaluation teams.

c. Disseminates information about providers to consumers through the Educational Information Centers.
d. Provides guidance on interpreting the information, including publication of consumer-oriented reports.
e. Conducts studies and surveys to obtain data on learner outcomes and assessments of provider services.

Thus, providers who do not meet the expectations of adult learners either change or cease to operate as the market declines. Those who do not meet minimum standards or lack evident qualifications are excluded, thus setting a limit on complete market control.

Some Suggested Issues for Forum Discussion

1. Should the primary reliance for quality control be on the informed decisions of consumers?
2. Is the restriction of the public role to setting *minimum* standards for eligibility to receive funds sufficient to insure quality?
3. Should private agencies, such as voluntary accrediting associations, also be involved in setting standards?
4. Should there be penalties for failure to observe minimum standards other than loss of eligibility for funding?

Goal #8: Assessment of Learning Outcomes: The Bottom Line

"I taught great—but they learned lousy."
A Professor

The real outcomes of education should be knowledge, understanding, skills, values, and strengthened capacities—not merely credits and a credential. Adults are interested in those real outcomes, not just in "fulfilling requirements." Employers are interested in what a job applicant can *do*. (A recent cartoon portrayed a personnel director looking over the resume of a recent graduate, still wearing his cap and gown. The personnel director is asking: "What *else* can you do, besides graduate?")

Such real learning should be rewarded with appropriate academic credit or other recognition, if the learner wants or needs it. Such opportunities would both encourage and reward real learning, and benefit society by providing evidence to employers and others of what a person knows and can do.

New York has made a notable start in this field through its High School Equivalency and External High School Diploma programs, and through the several ways that the state validates learning wherever and however acquired: the Regents External Degree, the College Proficiency Examination Program, the Credit Bank, and the Program on Noncollegiate Sponsored Instruction.

Through the Regents External Degree (REX), anyone can "show what they know" by taking examinations, earning credits, and eventually a degree. More than 14,000 men and women are currently working toward one of the associate's or bachelor's degrees offered, and over 8,000 have graduated. The degree is recognized by graduate programs and employers.

The College Proficiency Examinations developed by the state offer anyone the opportunity to earn college credit, advance in the REX program, satisfy New York state teacher certification requirements, and qualify for promotions, salary increases, or new jobs. Most colleges and universities in the state, and a growing number in other states, accept the credits.

The Credit Bank is another state-initiated innovation that helps learners get their achievements recognized. Anyone can register with the Bank, and for a modest fee, have all records of their college-level learning evaluated, placed on a master transcript, and provided to any institution or agency,

thus facilitating many educational, military, and employment requirements.

Through these innovations New York is already pioneering in fresh ways to assess adults' learning. But only a small proportion of adult learners are served by such programs. For the most part, throughout the state, as in the rest of the country, an individual can only obtain recognition of his or her learning by taking classes, accumulating credits, and earning a diploma or degree when sufficient credits have been amassed. Institutions or programs are just beginning to award recognition to learning, demonstrated competency, and even instruction received in business or industry.

Goal #8 for 2000: Assessment

There are opportunities for individuals to obtain competency-based assessments of learning outcomes. These assessments may be used to qualify for certification of competencies when desired by the learner or required or requested by a public or private agency. Credentials are competency-based, rather than time-based.

There are assessment agencies, separate from providers, that have a broad range of assessment procedures, not limited to paper and pencil tests, for determining competencies. Competencies to be measured are developed with involvement of employers, educators, government, and the public. Individuals use the assessment services as a part of the process of developing their educational and career plans. Employers heavily rely on assessment results in selecting and promoting employees. Learning acquired outside of planned study is included in the assessment. A national "credit bank" records assessment results. Credit evaluation is available for all levels of educational endeavor.

Some Suggested Issues for Forum Discussion

1. What agencies should do the assessment?
2. Should institutions that provide instruction also be allowed to certify competencies, or should certification be restricted to specially designated assessment agencies?
3. How should "competency-based" be defined?
4. Can the setting of *minimum* standards be done in such a way as to recognize the diversity among providers and not exclude unique and innovative approaches?
5. Should there be some minimum level of competency expected of all adults? If so, who should set the minimum, and what should be done if individuals fail to meet it?

Goal #9: Financing: Education as a Universal Right

When it was first proposed in the 19th century, the idea of public financing for the education of all children and youth seemed radical. But the demonstrable social need gradually convinced the vast majority of Americans that this was a proper, worthwhile, and necessary role for the state. We do not take for granted that the education of young people through high school graduation is a responsibility of our society.

Now the need for education has become lifelong. Learning is rapidly becoming a necessary part of life for everyone from those who missed out on formal schooling the first time around, in their younger years, to advanced professionals who find that their technical knowledge must be updated regularly.

But part-time adult students have less access to financial aid—both state and federal—than do full-time students, for a variety of reasons. For example, students in

many "non-traditional" college programs are eligible for only a portion of a grant or other aid, because payment is determined by the number of hours a student spends in the classroom, and these programs offer the opportunity to learn in other ways.

The result is that, nationally, only one out of every five part-time students gets federal aid (and many of these are GIs), whereas more than half of all "traditional" full-time students receive some financial help. Again, though part-time students represent 40 percent of all undergraduate students and one-third of all degree students, they received less than 6 percent of the $529 million in federal student aid and only one percent of the $206 million in state student aid distributed in 1976-77.

For persons over 21 who lack basic skills or a high school diploma, there's even less prospect of public funding. The bulk of the government money available to adult students goes for study leading to a degree or certificate. Less than 30 percent of the estimated $14 billion per year available nationwide for all forms of adult learning goes to disadvantaged adults.

To rectify this situation, state education authorities are weighing various policy changes. One would let school districts count for aid purposes students over 21 years of age, who lack high school diplomas.

Another would provide financial aid to needy part-time students in postsecondary institutions.

The Advisory Council concluded that the best way to support lifelong learning would be to provide assistance to learners, rather than by following the traditional pattern of support for institutions. If individuals could be provided with wherewithal to purchase those educational services which they truly need, based on adequate information and sensible judgment, a useful marketplace would be created in which "providers" could compete constructively and creatively to meet the needs of educational consumers.

The Goals statement therefore proposes an "entitlement" plan—financial aid available to every citizen at any point in his or her life, for serious educational purposes. Such a fund would enable each individual to pursue continuing education at just those times, in just those ways, that best suited his needs, lifestyle, and other preferences and requirements.

Goal #9 for 2000: Financing Core Skills

A right to appropriate education throughout life is recognized. Funding programs to reduce economic barriers to the realization of the right are in place. Emphasis is on insuring that all adults have acquired the "core" skills. Procedures are in place for defining "core" skills. Most public funds for education of adults are provided through the entitlement, thus giving adults primary control over the programs and institutions to be supported. These along with the provision of good information, are the key elements in insuring quality (see Goals 6 and 7). Sufficient funding for education is available because of society's recognition of the importance of lifelong learning in the realization of all other social goals, and because of economies realized through such measures as increased self-directed and peer learning, greater use of media, and alternation of work and education so as to reduce the "opportunity" costs of education.

Each person has a publicly funded entitlement to cover the tuition costs for "core" educational skills, i.e., competencies essential to function as a citizen, a member of a family, and a worker. These competencies may include some skills formerly associated with postsecondary education. They will be redefined periodically to reflect changes in society. The entitlement is financed from general revenues. There is no limitation on age, income, part-time/full-time attendance for recipients. Since there are many who cannot afford to participate in learning opportunities even when tuition is covered, the entitlement program is supplemented by a needs-based grant program for adults to cover living costs.

Goal #9B for 2000: Financing Beyond the Core

Beyond the core, there are individual drawing accounts financed by an educational fund (created out of general tax revenues) which has taken the place of state and federal student aid programs. The drawing account is a fixed lifetime amount, adjusted for inflation, to be used for such education-related purposes as the individual wishes. Adjustments are made in the amounts available to individuals for such special purposes as to (1) encourage voluntary public service (i.e., additions for serving as tutors, for Peace Corps and VISTA-type activities); (2) encourage military or other necessary services; (3) encourage individuals or employers to contribute to individual accounts; (4) recognize special individual circumstances, e.g., handicapping conditions, hardship situations, or excessively high-cost areas of training. Private industry and federal, state, and local governments are able to contribute to the funds (within limits) to induce students to train for occupations where there are shortages of trained personnel, or to attract students to certain locations, e.g., rural or economically-depressed areas.

Individuals are able to: (1) supplement their educational accounts with their own resources, grants from other sources, including employers and loans, and (2) pool their accounts with other learners to obtain desired services.

The public agency charged with quality control (see Goal 7) monitors the use of public funds. Students wishing to use their accounts are required to have their educational plans reviewed by a counselor, but the counselor does not have a veto over the student's final decision.

Some Suggested Issues for Forum Discussion

1. What kinds of adult education should be publicly funded?
2. Should public finds be given primarily to individuals or should greater use be made of direct grants to providers?
3. Should there be any distinction among the types of learning beyond "core" skills that will be eligible for entitlement support, i.e., vocational, occupational, cultural, credentialing, etc.? If such distinction is needed, by whom and how should this decision be made?
4. Will a system controlled by consumer interests, which often have a short-term perspective, satisfy public needs that often require a long-term perspective?

Appendix: Planning for the Future of Adult Learning Services in New York State

In 1978 State Education Commissioner Gordon M. Ambach appointed a 30-member Statewide Advisory Council on Adult Learning Services to advise him on matters of concern to adult learners and the institutions that serve them. One of the first tasks undertaken by the Council was the development of a statement of "Goals for Adult Learning Services."

The goals express what the Council believes should be the condition of adult learning in New York State by the year 2000.

In a parallel planning effort, the Board of Regents in October adopted the 1980 Statewide Plan for Postsecondary Education that projects goals for 1990. Since postsecondary institutions are one of the major providers of learning services to adults, the two planning efforts are, obviously, closely related. The Council will, therefore, be examining its goals, both in relation to the plan and to the future needs of adults and of the state.

Because of the great interest nationally in lifelong learning, the W.K. Kellogg Foundation has made a grant to the Education Commission of the States (ECS) to help states plan for lifelong learning. New York was selected as one of six pilot states to participate. As a result, the state will receive assistance in its planning. The results will be helpful to other states as they do their planning.

In preparing the goals, the Council had the benefit of contributions from educators of adults, both on the Council and outside. Before presenting the goals to the Commissioner, the Council wants to obtain the views of key persons in each community who have a differing perspective on the learning needs of adults, and who will play important roles in achieving the goals.

For this purpose, the Council, working with the State Education Department staff and the ECS Project, will hold a series of forums around the state.

The specific purposes of the forums are to:

1. Inform key community leaders about current developments in adult learning, including the factors that account for the growth in adult learning activities.
2. Receive comments and suggestions on the goals.
3. Consider the implications of the goals and the plan for their communities, including possible follow-up activities.

Participants in forums will be community leaders from government, business, labor, media, and education. Each forum will be a day-long meeting in a convenient location. Prior to the forum, each participant will receive two documents:

1. "Setting Goals for the Future of Adult Learning in New York State."
2. *Adults Learning Here—How the Education Department Serves Adults.*

Final Report: New York Assembly on Policies for Lifelong Education

New York is one of the most active states in the nation in fostering lifelong education. It is widely recognized for its success in creating diverse opportunities for adult learners.

The commissioner of education, the Board of Regents, the State Education Department, State University of New York, City University of New York, and individual institutions and agencies, in particular two-year colleges, have been important in progress that has been made toward a society of lifelong learners in New York.

This good work must be continued and extended. There are new policies, services, and programs needed to meet rising demand and unmet need for lifelong education, to reach unserved citizens, and to tackle unsolved social problems.

Topics addressed in this report were developed by the assembly participants as those they felt important in advancing the policy structure for lifelong education in New York.

The Special Role of Community Colleges

While we recognize the present limitation of fiscal resources for education, we believe in the entitlement of all adults to lifelong education opportunity through a wide variety of providers, and we offer the following specific recommendations:

- We encourage close study by the Board of Regents, the State Education Department, and the governor of the state of the special strengths which comprehensive community colleges bring to educational services for adults;
- a strong and well-established commitment to career programs, arising in many cases from the technical institute tradition;
- continuing program flexibility and diversity, with a taste for innovation which is inherent in the community colleges;
- a local base for commuters of all ages and circumstances;
- relatively low-cost—especially important for those increasing numbers of individuals who have been affected by changing economic circumstances;
- ability to relate to local schools, businesses, industry, and government in a particular direct and uncomplicated way;
- a strong commitment to the liberal arts and sciences, including teaching-learning goals and competencies which will better enable lifelong learners to cope with conditions of complex and changing society in the future;
- most important of all, a missionary zeal that focuses on the Open Door, the new students, adult students, individualized programs, experiential learning: the whole constellation of interests that can be summed up as "The Open Door to Lifelong Education."

These strengths have been recognized in other states and other countries, yet currently lack suitably strong and articulate advocates at policy levels in New York. Among the groups that might be served best by these colleges are most of the groups that are presently underserved by institutions of higher or further education, for example:

- rural populations
- those who are below present college entrance thresholds
- those who seek preparation for a vocation
- blue collar workers

- business and industry, through contract and credit courses
- adults seeking basic education
- returning adult students, especially women and others in career transition
- women in programs not traditional for women
- the handicapped
- minorities
- new immigrants
- older adults
- displaced homemakers
- under and unemployed adults
- inner-city residents.

The scope, diversity, geographic, and economic availability of community colleges, and their uncomplicated commitment to adult education, should be kept in mind when reviewing the recommendations of this assembly.

Recommendations to the State Education Department, Board of Regents, local sponsors, and other appropriate state agencies:

1. We recommend that state policy for lifelong learners be based on a philosophy of equal access tempered by the realization that learners come to education with differing motivation, aptitude, and ability.

2. We recommend that regulations generated by the State Education Department (specifically its regulations on the quality of education), the Division of Budget, the Department of Audit and Control, the Office of Employee Relations, and others be revised in light of the lifelong learning goals developed by the Commissioner of Education's Advisory Council on Adult Learning Services and by the American Association of Community and Junior Colleges.

3. We recommend maximum flexibility to local institutions to meet the objectives of lifelong education. Policies and procedures adopted by state agencies must be equally applicable to all institutions receiving public funds.

Participants in this assembly expressed strong dissatisfaction with central control and regulations that increase costs and inhibit the responsiveness, flexibility, and successful operation of institutions under its control.

4. We recommend that state regulatory agencies encourage flexibility and local autonomy to educational institutions for program development.

5. We recommend that the State Education Department encourage voluntary consortial approaches when evaluating proposals for funding of state or federally funded programs.

6. We recommend the inclusion of community colleges in the implementation of educational information centers at a local level throughout the state as a further development and extension of their current brokering and information role.

7. We recognize the potential diversity of lifelong education providers and recommend that all providers receiving public funds be subject to the same standards.

8. We recommend changing the state funding formula for credit and non-credit programs to include other recognizable self-directed adult learning activities.

9. We recommend that the state investigate future funding for student support services for lifelong learners enrolled in programs of occupational or career enrichment. For example, support systems and services normally provided during the workday are also needed by adult students during nights and weekends.

10. We recommend a review of the funding formulas for agricultural and technical colleges to provide support for their community adult education services on a parity with the support of community colleges.

11. We recommend that students beyond the age of compulsory attendance be provided

lifelong educational opportunities in appropriate educational environments, without limitations based on barriers of age or subject matter. Providers of such services should not be limited to traditional providers. The interpretation of the phrase "appropriate" should be a decision of each individual seeking such service.

We also recommend that the community colleges work together with the appropriate agency to develop a funding formula which will enable the colleges to serve this population. Such a funding formula should provide for support on a parity with that suggested in AL1.1 of the Adult Learning Services 1981 legislative package for adult funding.

12. We recommend that the State Education Department and Board of Regents include in their 1981-82 legislative package a proposal to support state aid for contractual courses offered by public institutions.

13. We recommend that the Board of Regents review the "full-time majority of faculty" rule as being inconsistent with goals of lifelong education and the learning society, and with the experience of many successful adult learning programs. We believe such a rule limits the desired flexibility of programs. The review should examine measures of faculty competence and other services available to students, rather than a simple numerical count of full-time and part-time faculty.

14. We recommend that a network of educational information centers be created through self-initiated consortiums of existing institutions, with funding assistance from the state. The centers would provide neutral counseling information. We believe it is appropriate for local communities to participate in and control the information and advisement for local adults.

15. We support competency-based assessment. We recommend, however, that assessment activities be carried out by local credentialling agencies in line with minimum standards which recognize the diversity among providers and do not exclude unique and innovative approaches.

Recommendations to the Office of Adult Learning Services:

1. We support the efforts of the office of adult learning services in the recent process of setting goals for the future of adult learning in New York and in taking a unified approach to the financing of specific adult learning needs.

2. We support the concept of a public entitlement to "core" skills (as developed in the Goals for the Year 2000 statement). We recommend, however, clarification of what specific core skills are deemed "essential" in order to set realistic limits on this entitlement.

3. We recommend significant rethinking of the goal #9B, "Financing Beyond the Core," in order to study carefully the consequences on institutional stability and current forms of financial aid and institutional support. For instance, would modification in the current TAP program meet similar objectives of the goal without the major changes in the financial aid approach?

4. We support the 1981 legislative package for adult funding with the following expansions: (a) that AL1 be expanded to include a wider spectrum of educational possibilities and choices, including postsecondary institutions; (b) that AL2 be increasingly specific in amending the education law authorizing state funds to be appropriated for occupational and pre-occupational programs by diverse local groups—including community colleges, unions, industries, EIC's, and coalitions of such groups—to attract and maintain business and industry.

Recommendations to all educational institutions and providers:

1. We recommend further development of linkages and resource sharing based on successful existing models such as: (a) the 15

industry-labor-education councils in New York, (b) New York Chapters of the American Society for Training and Development (ASTD), (c) the American Society for Engineering Education, (d) the Academy for Science, (e) Program Impact located in Buffalo, (f) the health advisory councils, (g) the High Technology Council of Binghamton, and (h) Industry Outreach at Onondaga Community College.

2. We recommend that two-year colleges develop and disseminate specific information about these industry-education linkages for the purpose of establishing new connections at the local level where they do not presently exist.

3. We recommend the continued support, study, and dissemination of information relative to the role of the two-year colleges in future "learner-paced" technology. For example, AACJC and the Corporation for Public Broadcasting are collaborating on televised courses and the use of future technologies, such as video cassette and video disc. Public TV stations in New York State have a working relationship with local colleges relative to televised courses.

4. We recommend that additional resources and funding be developed for faculty trained in teaching adults.

Recommendations to New York Business and Industry:

1. We recommend that a statewide "think tank" group, composed of representatives of business, industry, labor, consumers, and educational providers, be created for the purpose of assessment, planning, and feedback evaluation of lifelong learning policies and programs.

2. We recommend that business and industry groups work together with the community colleges and the adult learning services office to support a 1981-82 legislative proposal for state aid for contracted courses.

3. We recommend that future funding for lifelong education opportunity should not be exclusively a state government responsibility, but should include business and industry as additional sources of support.

Recommendations to the members of the New York Assembly on Policies for Lifelong Education:

1. We recommend that initial steps be taken to create a consortium in New York State to bring together all public interest educational organizations to consider and take action on policy, fiscal patterns, and planning for lifelong learning.

2. We recommend that an initial ad-hoc group (to initiate the process and develop its guidelines) be composed of members of this assembly representing the various constituencies that were included.

We further recommend that, in order to achieve the above objectives: (a) a clear set of guidelines for implementing the process be developed, and (b) these guidelines should include outcome evaluations of what the consortium wishes to achieve, what is achieved, what actions to take if desired outcomes are not achieved, and a timetable for action and events.

3. We recommend that a mechanism be created to seek support of private sources of aid in the funding of lifelong education.

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CALIFORNIA ASSEMBLY
ON POLICIES FOR
LIFELONG LEARNING

(Final Report)

Los Angeles, California
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Final Report: California Assembly on Policies for Lifelong Education

California's education is unique in that it is free of tuition. The concept of lifelong education needs to be analyzed with this California circumstance in mind.

One state official recently remarked that California had the resources ($168 billion "G.N.P") and taxing level to make it the eighth major power in the world. California has less "G.N.P." than the United States, Union of Soviet Socialist Republics, Japan, West Germany, France, China (Mainland), and the United Kingdom. The state is ahead of Italy, Canada, Brazil, Poland, Spain, India, and all other nations than the top seven listed above. California out-performs most nations with its $7.7 billion agricultural industry and the ability to provide 25 percent of the U.S. food supply. With increasing consumer goods per capita, a thriving export trade, and higher family incomes, the California economy continues to diversify. This will bring changes in the service industries—including education and finance.

Because California has grown so large, diverse, and complex, a uniform community college system or uniform lifelong education program would not appropriately serve all citizens. Each community must develop its own program, uniquely suited to its local needs. However, lifelong education is a concept variously defined and practiced in community colleges (as well as in the other educational institutions). It is offered under a variety of labels: credit and non-credit continuing education, adult education, night school, extension service, retraining, upgrading, community services, and a host of other practices.

California's community colleges provide an astonishing diversity of services—a reflection of their abilities to react immediately to local community needs. The state should capitalize on community colleges' responsiveness for continued success in both credit enrollment and in community services.

We believe it is time to redefine the community college role as more than a collection of parts. We believe that lifelong education *is* the role and that the college's components, however titled, whether traditional or not, are all equally important parts of the service we provide to local adults, regardless of age.

In the recent past, community colleges have operated around the traditional 18 to 21-year-old "college age student." We believe that age as the criterion for defining the major thrust of the community college is a concept whose time has passed. In 1980, the average age of the community college student is close to 30.

Once we educated our youth so they could take productive roles in society—for benefit not only of themselves but for society at large—and we felt that one chance was all they deserved or needed. But if society educates citizenry so that it can continuously maintain productivity and quality of life, then the state must recognize that the world served by today's education is no longer so simple; and both society and individuals require almost continuous opportunities to prepare for changes in an increasing lifespan. In the early 1900's we did not worry about training people for four or five career changes in their lifetimes. In the early 1900's we did not consider the personal development needs of people undergoing their "passage" through stages of maturity in a stressful world. In the early 1900's, we had no "re-entry women" movement. In the early 1900's we had no upwardly mobile

minority. In the early 1900's we were a more simple, agrarian society, not a service oriented society with 38,000 job titles.

The externals of our society force our citizens into retraining and re-education if they are to survive. And it is in the enlightened self-interest of our society to provide them with the educational mechanism for survival. They need and demand basic skills, occupational training, retraining, transfer programs, personal development, and cultural growth at various times and in various fashions.

In unprecedented numbers they—the citizens—are opting for education in all the stages of their lives. The community colleges, although not the only institutions providing services, are the best mechanism our communities have for providing what the citizenry demands and no doubt deserves.

It is in the best interests of society that it designate the community colleges as the pivotal agency in each community to assure that such services are provided. Either directly, or indirectly as a brokering service, the community college can bring the resources of other institutions into the lifelong education continuum.

The California Assembly endorses the "Bill of Rights" for the lifelong learner, formulated by the 1979 AACJC National Assembly on Policies for Lifelong Education, as a philosophical basis for its recommendations. (See Appendix.)

Recommendations to the state government:

1. That a major function of community colleges in California be that of providing opportunities for lifelong education.

2. That the community college has the primary responsibility for providing education for adults in its local service area. Lifelong education need not, however, be the exclusive responsibility of any one agency.

3. That policies for allocation of fiscal resources and program offerings in adult and continuing education should be determined at the local level.

4. That a system of providing adequate and timely funding should be established to allow effective planning and implementation of lifelong education.

5. That future state funding should be based upon total enrollment as well as upon average daily attendance (A.D.A.) in order to support continuing education programs and services.

6. That space utilization formulas be revised to include peak enrollment demands whether late afternoon, evening, or weekend instructional activities.

7. That the state provide the necessary incentives to industry and business to establish cooperative relationships and programs with the community colleges, especially in areas of advanced technology.

Recommendations to the chancellor and state board:

1. That with the exception of spectator entertainment functions, the total community college program—determined by local interest and the market test of enrollment—be accepted for full and equal funding by the state.

2. That legislation be written to allow greater flexibility in partnership efforts between industry and the college to fulfill our lifelong education needs.

3. That CCCJA, AACJC, ACCCA, CCCT, CCCCEA, and other appropriate agencies be enjoined to assist in a state-wide campaign to change the perceptions of citizens, legislators, faculty, and other educators regarding the colleges' role in lifelong education. Such a campaign would stipulate:

- that community colleges are the pivotal enabling agency in the state for the lifelong education of the citizenry;
- that one million users are a great test market of the validity of the assumptions

that the services are needed, useful, and of sufficient quality to be offered and funded;
- that the regional accrediting agencies and local boards and staff are sufficient guardians of quality control;
- that lifelong education is the total program of the college and that there are *no* inappropriate programs if the citizens need them at some stage of their development for quality survival in our changing society.

4. That an economic impact study be undertaken to document the results of community colleges.

Recommendations to the community colleges:

1. That lifelong education for individual and community development should continue to be a major mission of community colleges.

2. That community colleges should concentrate on educating legislators and other state policy makers concerning the societal and economic benefits of lifelong learning.

3. That support services should be provided for continuing education students based on needs assessments; and that traditional services should not, necessarily, be duplicated.

4. That colleges encourage the use of new technological methods and new strategies to meet the lifelong education needs of the nonmobile populations, such as home-bound or institution-bound students.

5. That greater consideration be given to life-learning experiences in student placement, and that credit be accepted for such experience. Credit by examination must receive more acceptability. State and local policies should encourage non-traditional learning strategies in both credit and non-credit programs.

6. That colleges be even more flexible in meeting the needs of local adults. Outreach programs, length of classes, and methods of instruction must be adaptable and locally determined.

7. That the institution that offers the program must accept the responsibility to evaluate the program. This responsibility also carries with it the need to report regularly to the college district governing board and to the constituency about the success or failures of the program. Accountability is imperative.

8. That lifelong education in the community college is a shared responsibility with all those in the community. In some instances, shared cooperative ventures among the various agencies need to be developed.

9. That staff development programs for both full-time and part-time faculty should emphasize teaching strategies for and sensitivity toward adult learners.

10. That colleges review their policies on financial aid for part-time students.

Recommendations to the California public:

1. That we consider it sound public policy and in the best interest of society in general to provide tuition-free lifelong learning at public expense. Lifelong education is a sound public investment.

2. State funding is recommended with an equitable formula that does not make it fiscally advantageous to a college to offer certain courses and not others.

3. That education programs must be determined by student needs and not by existing funding formulas.

4. That lifelong learning opportunities will result in economic development and improve the quality of California life. The state and local governments should effectively inform the public of these opportunities and encourage its participation. In this process we must recognize our rapidly changing learning clientele and their changing needs.

5. That lifelong education must be an integral part of our comprehensive community colleges with all segments of the colleges participating. The college will need more

flexibility to respond faster with new and different configurations of course content, scope, and sequence.

6. That community colleges need more local control, freedom, and flexibility to act efficiently and effectively in all college matters, including the area of lifelong learning. The scope of lifelong learning programs must be as vast as the educational needs of our constituents.

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